



Business Account Representative Training Manual

**Version 4
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Business Account Representative Training Manual

OVERVIEW

The ORCA Business Account website allows business representatives to perform many functions related to managing their account. Through the Business Account website interface, a business representative can:

- Update (change) its password
- Manage its agreement (change contacts, addresses)
- Manage card groups (move cards between groups and branches)
- Create new orders, order products, and confirm orders (order additional cards, load passes, electronic purse value or vouchers onto cards, pay for orders via credit card)
- Manage card details (blocking, unblocking, associating regional reduced fare permit cards)
- Generate reports

This training manual provides step by step instructions for performing these functions. If you require additional assistance, please contact your Lead Agency representative.

ACTIONLISTING

In general, when you perform most card management functions via the Business Accounts website, such as blocking or unblocking a card or product, or adding a product or value to a card, this function does not happen immediately but through the following process.

An action taken on the Business Account website (e.g., blocking a card) places the order for that action on an "actionlist." Actionlists are downloaded to the distribution system twice a day -- at 2:00 a.m. and 2:00 p.m.

Actionlists must be downloaded to the devices located on each bus in order for them to affect the status of an individual card. Downloading to a bus happens when the bus enters and departs its bus base. Consequently, it can take 24 to 48 hours for a particular action to be downloaded to a bus, depending on when the order was entered into the website, when the actionlist was downloaded, and when a particular bus received the download.

Once the actionlists have been downloaded to devices and buses throughout the regional system, the cards must be tapped for the actionlist to produce the desired action on the card. Cards may be tapped at the following locations:

Unit	Reader Display Example
Any bus outside free fare zone	Pass, "Added Pass," \$0.00
Any bus inside free fare zone	Free Area, Fare Not Deducted
Stand Alone (e.g., yellow devices at train stations)	International District (location), 01/04/2010 (date), Fare paid, \$0.00, "Card Revalued" <i>Note: If using the Stand Alone simply to activate actionlist with no trip, please tap off once message is read.</i>
Ticket Vending Machine (TVM) card reader	Action: Place card in card reader TVM Message: Error Reading Card, Transaction Cancelled Action: Wait until message clears; card is read again Action: Touch screen on button – "Show ORCA Card details" TVM Message: E-purse value or Pass is listed on card detail screen

ACCOUNT CREATION

The ORCA Business Accounts website allows you to pick the transit product that best fits your business needs. Enter the following web address: www.orcacard.biz and the following page will open.



For more information about the types of business accounts available, click on the left navigation button appropriate for your business:

- ORCA for business (employer)
- ORCA for government agencies
- ORCA for human services organizations
- ORCA for schools

There are two major programs businesses and other organizations can participate in to provide benefits for their employees or affiliates: Business Choice and Business Passport.

BUSINESS CHOICE

Business Choice is all about flexibility. Businesses can provide ORCA cards to as few or as many cardholders as they choose. On a single card, they can include a monthly pass for bus, train or ferry travel plus stored transportation value via the e-purse or e-voucher options. E-purse stored transportation value can be used directly on the bus, train or ferry on a per-ride basis or converted to various monthly pass options.

Features of the Business Choice program include:

- Easily establish and execute an online agreement and a standard monthly order.
- Online card management.
- Load multiple ORCA options on a single ORCA card.

If Business Choice provides the program you want, you can set up your own account.

1. Simply click on the **Sign Up Now** button on the left navigation bar.



- Click on the button next to **Business Choice products**.

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Search: [Search](#)

New Customer Sign Up

Please select the products you wish to order:

☒ Business Choice products. E-Purse, Voucher, Monthly Passes ordered online.

☐ Business Passport products. Ordered directly from an agency.

☐ I don't know what products I want.

[Continue](#)

- Click **Continue**.
- Read the **Business Accounts Terms & Conditions**. If you accept the Terms & Conditions, click on **Agree** button at the bottom of the page. A copy of this document will be mailed to you. You will need to sign and return it prior to approval of your agreement.

If you do not agree to the Terms & Conditions, leave the default button marked as "Disagree." Clicking on continue will return you to the home page.

- Click **Continue** and follow the directions, completing all information marked with an "*" on each horizontal tab.

TAB 1 – BUSINESS ACCOUNT INFO

This tab requires your business name, tax ID, county location, zip code, and addresses.

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Search: [Search](#)

New Customer Sign Up

[1. Business account info](#) [2. Contact info](#) [3. Website](#) [4. Check](#)

You are eligible to use our online application system to apply for a business account agreement. Please complete the following information.

Fields marked with an asterisk (*) are required

Business Account

Business Account Name:

Tax ID:

TAB 2 – CONTACT INFO

This tab requires your account contact name, phone number, and email address.

The screenshot shows the ORCA logo at the top left with the tagline "one regional card for all". To the right is a search bar with the text "Search:" and a blue "Search" button. Below this is a section titled "Register New Agreement" with four tabs: "1. Business account info", "2. Contact info", "3. Website", and "4. Check". The "2. Contact info" tab is selected. The main content area says "Enter the contact details of up to four contacts for this agreement." and "Fields marked with an asterisk (*) are required". A section titled "Business Account Contact 1" contains three fields: "Contact First Name:" with the value "Sharon", "Contact Last Name:" with the value "Stockwell", and "Phone Number:" with the value "253 - 581 - 8112".

TAB 3 – WEBSITE

This tab requires you to set your password.

The screenshot shows the ORCA logo at the top left with the tagline "one regional card for all". To the right is a search bar with the text "Search:" and a blue "Search" button. Below this is a section titled "Register New Agreement" with four tabs: "1. Business account info", "2. Contact info", "3. Website", and "4. Check". The "3. Website" tab is selected. The main content area says "Fields marked with an asterisk (*) are required". A section titled "Website" contains two fields: "Password:" and "Confirm Password:", both with masked input (dots). Below these fields is a note: "Please select a password that is between 6 - 15 characters. Please note that passwords are case sensitive. Your username will be given to you at the end of this process. Please keep a record of your password and do not disclose it to anyone." At the bottom right are three buttons: "Cancel", "Back", and "Next".

TAB 4 – CHECK

This tab allows you to check all the information you entered prior to submission.

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Search:

Register New Agreement

1. Business account info 2. Contact info 3. Website 4. Check

Please review the details you have entered below to ensure they are correct. If an item is incorrect click on the item heading to return to that page and correct it. Once it has been corrected use the "Next" button to return to this page.

Business Account Information

Business Account Name: Pierce Test 2
Tax ID: 91-223344
Commercial Account ID:

Location

County: Pierce
City:

Once you have completed and submitted your account information, you will receive the following screen. This screen contains the name of your Lead Agency and your Business Account ID. Please print this page for your files.

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Search:

Register New Agreement

This application has been submitted with a status of "Pending". It will need to be approved by King County Metro before it becomes "Active". Thank you. Your Lead Agency representative will contact you as soon as approval is complete.

The Business Account ID for this application is 1190. You will need to make a note of this number as it will be your username.

BUSINESS PASSPORT

Business Passport provides unlimited transit transportation access to all business cardholders at your business typically for a full year. The Business Passport program includes two options: per-trip pricing and flat-rate pricing.

Per-trip pricing provides a regional pass that is valid with all transportation agencies in the ORCA system, including the Washington State Ferries. Under this option, Business Passport covers the full fare of all regularly scheduled transportation services. A business account is invoiced each month for the total number of trips taken by its cardholders.

Flat-rate pricing is available through each participating transportation agency. Each provider sets its own price, which is fixed for the term of the agreement. The pricing is based on the previous year's ridership data for the business, plus a growth premium as determined by transportation agency participants. The Washington State Ferries does not participate in this

program, but businesses may purchase ferry passes separately, at retail rates. Ferry passes can be loaded onto the same physical card that has the Passport product.

Features of the Passport Program include:

- Pricing that is, over time, based on real trip information, not surveys.
- Include other benefits (e.g., a guaranteed ride home in the event of an emergency).
- Provide unlimited rides on multiple transportation systems via a single agreement.
- Load additional ORCA options such as e-purse or e-vouchers on the card.

You can find out if your business is eligible for Business Passport by contacting a transit agency representative in your County. Once eligibility is confirmed, the transit agency assigned as your Lead Agency will set up your agreement and provide you with online access.

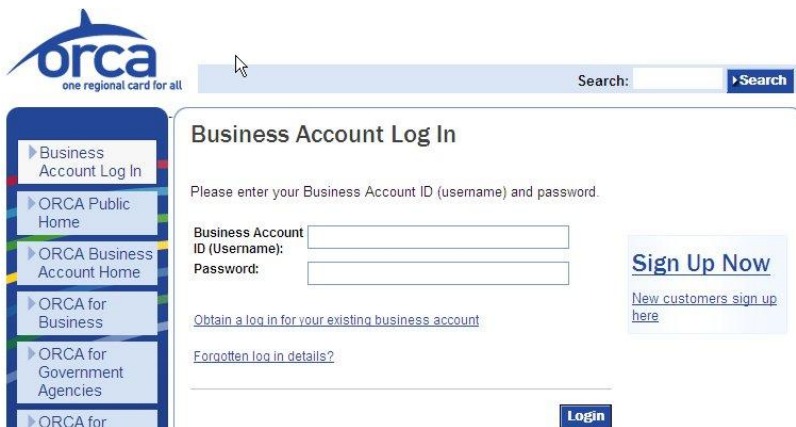
BASIC NAVIGATION

LOGIN

To login to the Business Account website, enter the following web address: www.orcacard.biz. The following page will open.



Click on **Business Account Log In** and the following page will open.



You will need your Business Account ID number. This numeric Business Account ID number is your login username and cannot be changed.

You receive this account number in one of two ways:

You created your own account on the Business Account website
(only available for Choice accounts)

You received a successful agreement setup page that provided the number and you created your password at the time of creating your account. To login, enter your Business Account ID (Username) and password as indicated.

Register New Agreement

This application has been submitted with a status of "Pending". It will need to be approved by Pierce Transit before it becomes "Active". Thank you. Your Lead Agency representative will contact you as soon as approval is complete.

The Business Account ID for this application is 1159. You will need to make a note of this number as it will be your username.

Your account was created for you by your Lead Agency (for all Passport accounts and some Choice accounts)

For security, your Lead Agency will establish an **initial password** for your account. This step prevents someone from accidentally entering your Business Account ID number while establishing their own password.

You will receive your Business Account ID number and an **initial password** from your Lead Agency.

You will receive **two emails** from your Lead Agency – one with your Business Account ID number and a second email with your initial password.

To login, enter your Business Account ID (Username) and the assigned password.

The first time you login using this initial password, you should change your pre-assigned password to a safe and secure password of your choosing. See section titled Update Your Password.

Register New Agreement

This application has been submitted with a status of "Pending". It will need to be approved by Pierce Transit before it becomes "Active". Thank you. Your Lead Agency representative will contact you as soon as approval is complete.

The Business Account ID for this application is 1159. You will need to make a note of this number as it will be your username.

You can only have one password for your account, and all authorized users will use the same password and have the same level of access to your account. Account login information should be distributed only to those who need access to your account for ordering or management purposes.

If you incorrectly enter your Business Account ID, you will see the following error message:

Sorry no active agreement was found matching the Business Account ID you entered. Please check the ID and if you continue to have problems, contact your Lead Agency.

Try retyping your login information. If you continue to have problems logging in, please contact your Lead Agency representative.

Logging in always takes you to the **Current Order Summary** page.

When you login, the following menu items are displayed on the left side of the page in the following order:

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create/Maintain Branches
- Create/Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

- Generate Reports

The screenshot displays the ORCA Business Account Representative Training Manual interface. The top header includes the ORCA logo, the text "one regional card for all", the user ID "1050701 - Online Test Club", and links for "Update password" and "Logout". The left sidebar contains a menu with the following items: "Business Account Orders" (with a shopping cart icon), "Shopping Cart", "Current Order Summary" (highlighted), "Card Management" (with sub-items: "Summary of Card Accounts", "Create / Maintain Branches", "Create / Maintain Card Groups"), "Agreement" (with sub-items: "Manage Agreement Details", "Vanpool Subsidies"), "Contact" (with sub-item: "Contact Us"), and "Reports" (with sub-item: "Generate Reports"). The main content area is titled "Order Summary" and contains a section for "Current Orders Summary". Below this, a text block explains that the list shows current orders and provides instructions on how to confirm, unconfirm, or cancel orders. A table lists the current orders, with one order shown: Order Number 8069, Order Status Completed, Order Month / Date Created 07/30/2008, Order Item Cards, and Order Amount \$ 202.50. The table is followed by a "Page:1" indicator. At the bottom of the main content area, there are four buttons: "New Card Order", "New Product Order", "Cancel Orders", and "Unconfirm".

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1050701 - Online Test Club [Update password](#) | [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary**

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

- Generate Reports

Order Summary

Current Orders Summary

This is a list of your current orders. Select any orders you wish to confirm or unconfirm. Orders may not be unconfirmed after the 10th of the month. To modify or cancel a confirmed order after the 10th of the month you must [contact your Lead Agency](#). Click on an order to view more details.

Page:1

Order Number	Order Status	Order Month / Date Created	Order Item	Order Amount
<input type="checkbox"/> 8069	Completed	07/30/2008	Cards	\$ 202.50

Page:1

[New Card Order](#) [New Product Order](#) [Cancel Orders](#) [Unconfirm](#)

RESET FORGOTTEN PASSWORD

If you forget your password, click the **Forgotten log in details** link on the login page. This link will take you to screen where you can reset your password.

You will need your Business Account ID number and either your Business Name or your Tax ID number to complete this task. Your new password will be emailed to the address of the primary Business Contact person specified in your agreement.

Business Account Log In

Please enter your Business Account ID (username) and password.

Business Account ID (Username):

Password:

[Obtain a log in for your existing business account](#)

[Forgotten log in details?](#)

[Sign Up Now](#)

[New customers sign up here](#)

[Login](#)

CHANGE PASSWORD

You can change the password for your Business Account at any time by clicking on the **Update Password** link in the upper right corner of any page. All authorized users of the Business Account will need to be notified of the new password.

Business Account Orders

Shopping Cart

Current Order Summary

Order Summary

Current Orders Summary

This is a list of your current orders. Select any orders you wish to confirm or unconfirm. Orders may not be unconfirmed after the 10th of the month. To modify or cancel a confirmed order after

[Update password](#) | [Log out](#)

LOGOUT

Click the **Logout** button located at top right hand corner of any page. You will be asked if you are sure you want to logout of ORCA Business Accounts.



You must click the **Continue** button to continue logging out. When you logout, you will be returned to the public Business Accounts Home page.

AGREEMENT MANAGEMENT

CHANGE BASIC AGREEMENT INFORMATION

If you need to change basic information about your agreement, such as addresses or phone numbers, you will use the **Manage Agreement Details** function. Clicking on the **Manage Agreement Details** in the left navigation bar will take you to your Business Account Agreement Administration page.

The screenshot shows the ORCA website interface. The top header includes the ORCA logo with the tagline 'one regional card for all', the account name '1190 - Pierce Test 2', and links for 'Update password' and 'Logout'. The left navigation bar has several sections: 'Business Account Orders' (with a Shopping Cart icon), 'Card Management' (with links to Current Order Summary, Summary of Card Accounts, Create / Maintain Branches, and Create / Maintain Card Groups), and 'Agreement' (with links to Manage Agreement Details and Vanpool Subsidies). The 'Manage Agreement Details' link is circled in red. The main content area is titled 'Business Account Agreement Administration - Pierce Test 2' and contains two tabs: 'Business account information' (selected) and 'Contact information'. Below the tabs, there is a message: 'Enter or update the information for this agreement. Click "Save" to save any changes.' and a note: 'Fields marked with an asterisk (*) are required'. The 'Business Account' section includes fields for 'Name' (Pierce Test 2) and 'Tax ID' (91-223344). The 'Mailing Address' section includes fields for 'Line 1' (PO Box 99070), 'Line 2' (empty), and 'City' (Lakewood).

There are two tabs at the top of this page:

- **Business Account Info tab** – allows you to review company information, such as company name, tax ID, and mailing, shipping and billing addresses. Contact your Lead Agency representative if any of this information needs updating.
- **Contact Information tab** – allows you to edit the contact information you entered initially or add additional contact persons. To change an email address, you will need to contact your Lead Agency representative.

Use the **Save** button at the bottom right of each page to save any changes you have made. You will remain at this screen unless you logout or click on another function via the left navigation bar.

DOCUMENT VANPOOL SUBSIDIES

By clicking on the **Vanpool Subsidies** button in the Agreement section of the left navigation bar, you can view the vanpool subsidy amount provided to employees, either as a dollar amount or as a percentage of total cost vanpool subsidy.



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one regional card for all

1190 - Pierce Test 2 [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies**

Contact

Maintain Vanpool Subsidy Table

Fields marked with an asterisk (*) are required

Branch:

Lead Agency Business Account ID: PTPierc0102

Business Account Name: Pierce Test 2

Business Account ID: 1190

Card Group	Monthly Rider Subsidy	Monthly Rider %
Default Group - 1190	\$ <input type="text"/>	Or <input type="text"/>

Currently, this information will be used only to verify that employees are eligible for a vanpool subsidy. If applicable for your Business Account, your Lead Agency will have recorded the vanpool subsidy amounts based on information your Business provided. Should this information change, please notify your Lead Agency so the Account can be updated.

CARD MANAGEMENT

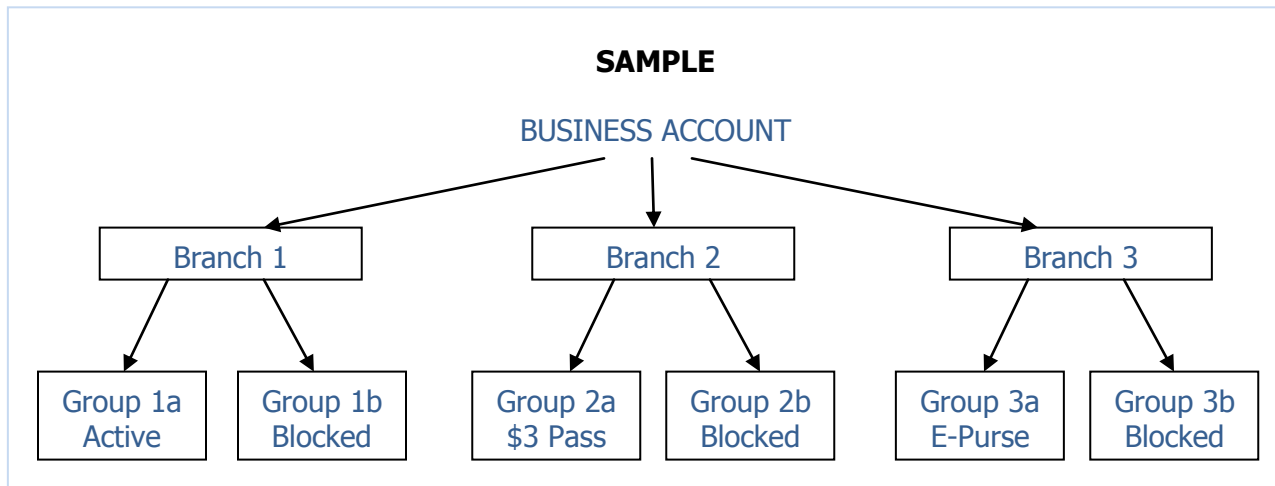
Card management functions provide tools to group cards for easier product purchase and reporting, to allow you to replace lost cards, and to allow you to block and unblock cards as needed.

Both branches and groups are available to businesses for managing cards. Your account must have at least one branch and one group. If you do not need to create additional branches or groups, you can simply use the default branch and group created for you in the system. You can rename the default branches (see Update Branch).

You can create as many branches and groups as you need to best manage your account transactions. Branches can have distinct shipping addresses which may be beneficial if you have different locations where cards should be directly shipped. Many reports will also provide branch subtotals.

Each branch can have one or many groups. You choose how you want to group cards. Common ways of grouping cards include type of product, active, and blocked.

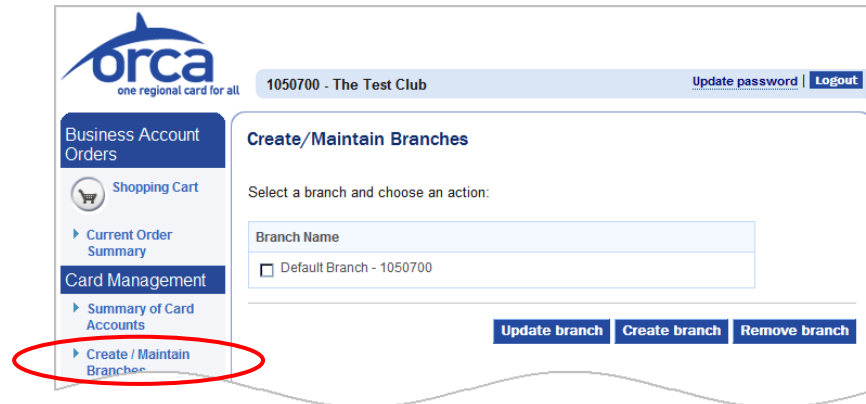
A card can only be associated with one branch and one group at a time, though you can move cards between branches and groups as needed. Thinking through how best to use the branch and group structure before you set them up may simplify your ongoing administrative tasks associated with your Business Account.



CREATE/MAINTAIN BRANCHES

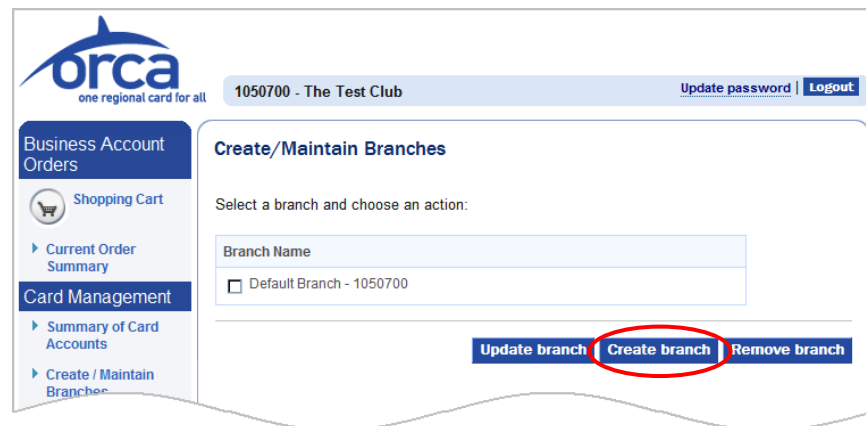
Clicking on **Create/Maintain Branches** on the left navigation bar will take you to the following screen, where you can:

- **Create branch:** add a new branch.
- **Update branch:** rename a branch, change the address associated with a branch.
- **Remove branch:** delete a branch that has already been created.



CREATE BRANCH

1. Click on **Create branch** on the Create/Maintain Branches screen.

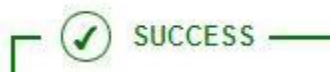


2. Enter the name and address of the new branch. You can also enter any special instructions that pertain to that branch, such as a delivery instructions (e.g., please call xxxx when delivery is shipped).

The screenshot shows the ORCA Business Account interface. The header includes the ORCA logo, the text 'one regional card for all', and the account name '1050700 - The Test Club'. There are links for 'Update password' and 'Logout'. The left navigation bar has sections for 'Business Account Orders', 'Shopping Cart', 'Card Management', 'Agreement', and 'Contact'. The 'Create Branch' link is circled in red. The main form area is titled 'Create Branch' and contains instructions: 'Enter a branch name and delivery details for this branch. Fields marked with an asterisk (*) are required'. The form fields include: 'Branch Name' (with 'Even Newer Test Club' entered), 'Delivery Address' section with 'Line 1' (3Test Rd), 'Line 2' (empty), 'City' (Test), 'State' (Washington dropdown), 'Zip Code' (99999), and 'Special Instructions' (empty). At the bottom right are 'Back' and 'Create branch' buttons.

3. Click the **Create Branch** button at the bottom of the page when you are finished.

The screen will update with a **"Success"** message in green at the top of the page, noting the branch has been successfully added.



Use the Back button at the bottom of the page or the buttons in the left navigation bar to move to a different page.

Note: Please wait 24 to 48 hours **BEFORE ordering** cards or **moving** cards to any newly created Branch. If you move cards prior to this time, any products on the cards at the time you move them will be temporarily unavailable.

Note: After moving cards to the newly created Branch, you must wait another 24 to 48 hours for this new actionlist to get downloaded to all devices. After that time, the cards must be tapped for them to become associated with this Branch. (This tapping does not apply when you order new cards for the Branch.) Once the cards have been tapped, you may order products for those cards. Any products on the cards at the time you move them should remain unaffected.

IMPORTANT: Although you may delete Branches, it is not a good practice until you are positive no cards remain associated with that branch since any cards that remain in that branch will also be deleted. You may choose to rename it, such as "Unused Branch."

UPDATE BRANCH

1. You must first select the branch you want to update by clicking on the **check box** next to that branch on the Create/Maintain Branches screen.

The screenshot shows the ORCA web application interface. At the top, the ORCA logo is on the left, and the user is logged in as '1050700 - The Test Club' with links for 'Update password' and 'Logout'. A left navigation bar contains links for 'Business Account Orders', 'Shopping Cart', 'Current Order Summary', 'Card Management', 'Summary of Card Accounts', 'Create / Maintain Branches', and 'Create / Maintain Card Groups'. The main content area is titled 'Create/Maintain Branches' and prompts the user to 'Select a branch and choose an action:'. Below this is a table with three rows, each with a checkbox and a branch name: 'Default Branch - 1050700', 'Even Newer Test Club', and 'First Test Club Branch'. The first checkbox is circled in red. At the bottom of the table are three buttons: 'Update branch' (circled in red), 'Create branch', and 'Remove branch'.

2. Click the **Update Branch** button.
3. Make any necessary changes.
4. Click the **Update Branch** button at the bottom of the screen when you are finished.

The screen will be refreshed with a **"Success"** message in green at the top of the page, noting the branch has been successfully updated.



Use the Back button at the bottom of the page or the buttons in the left navigation bar to move to a different page.

REMOVE BRANCH

IMPORTANT: Although you may delete Branches, it is not a good practice since any cards that remain in that branch will also be deleted. You may choose to rename it, such as "Unused Branch."

1. You must first select the branch you want to update by clicking on the **check box** next to that branch on the Create/Maintain Branches screen.

The screenshot shows the 'Create/Maintain Branches' interface. At the top, there's a header with the Orca logo and 'one regional card for all'. Below that, a navigation sidebar on the left includes 'Business Account Orders', 'Shopping Cart', 'Current Order Summary', 'Card Management', 'Summary of Card Accounts', 'Create / Maintain Branches', and 'Create / Maintain Card Groups'. The main content area is titled 'Create/Maintain Branches' and contains the text 'Select a branch and choose an action:'. Below this is a table with three rows, each with a checkbox and a branch name: 'Default Branch - 1050700', 'Even Newer Test Club', and 'First Test Club Branch'. The 'Remove branch' button at the bottom right is circled in red.

Please note: you cannot delete a branch with cards still assigned to it. If you try to remove a branch that still has cards assigned to it, the following error message appears. However, first moving cards to another branch may not result in the desired change IF those cards are not tapped before you remove the branch.

The screenshot shows the 'Create/Maintain Branches' interface with an error message. The error message is displayed in a red box with a red border and a red exclamation mark icon. The text of the error message is: 'Unable to remove branch New Test Club Branch as it has cards assigned to it. Please move those cards to another branch/group before removing.' Below the error message, the 'Select a branch and choose an action:' section shows a table with two rows: 'Default Branch - 1050700' and 'New Test Club Branch'. The 'New Test Club Branch' row has its checkbox checked. The 'Remove branch' button at the bottom right is circled in red.

Note: Please ensure that all cards assigned to a branch that you wish to remove have been reassigned to another branch prior to completing the following steps and that all cards have been tapped.

Directions on moving cards between branches are provided in the section on Create/Maintain Card Groups. After all cards are moved out of the branch you are trying to remove, you can remove the branch using the instructions provided below.

1. Click the **checkbox** next to the Branch to be removed

The screenshot shows the ORCA Business Account interface. The top navigation bar includes the ORCA logo, the text 'one regional card for all', the current branch '1050700 - The Test Club', and links for 'Update password' and 'Logout'. The left sidebar contains navigation links: 'Business Account Orders', 'Shopping Cart', 'Current Order Summary', 'Card Management' (highlighted), 'Summary of Card Accounts', 'Create / Maintain Branches', and 'Create / Maintain Card Groups'. The main content area is titled 'Create/Maintain Branches' and prompts the user to 'Select a branch and choose an action:'. Below this is a table with three rows, each with a checkbox and a branch name: 'Default Branch - 1050700', 'Even Newer Test Club', and 'First Test Club Branch'. The checkboxes for 'Even Newer Test Club' and 'First Test Club Branch' are circled in red. At the bottom of the table are three buttons: 'Update branch', 'Create branch', and 'Remove branch', with the 'Remove branch' button also circled in red.

2. Click the **Remove Branch** button. You will be taken to a confirmation page, where a list of branches designated for removal will be listed. Review this page carefully.
3. Click the **Confirm** button to delete designated branches.

The screen will return a **"Success"** message in green at the top of the page, indicating the branch(es) have been removed and listing the remaining branches.



Use the Back button at the bottom of the page or the buttons in the left navigation bar to move to a different page.

CREATE/MAINTAIN CARD GROUPS

Card groups can be used to simplify product ordering or card management functions, such as blocking cards. A default group will be created for all cards if no action is taken by the business. All groups must be assigned to a branch. Group names can be reused in different branches, but a card can only be in one group and one branch at a time.

Clicking on **Create/Maintain Card Groups** under Card Management on the left navigation bar will take you to the following screen:

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1050700 - The Test Club [Update password](#) [Logout](#)

Create/Maintain Card Groups

Branch:

Select a group(s) and choose an action:

Group Name	Description	Group Status	Number of Cards
<input type="checkbox"/> Default Group - 1050700	Default Group for business : 1050700	Active	1

[Create group](#) [Remove group](#) [Rename group](#)

[Unblock](#) [Block](#) [Import](#) [Export](#) [Move card\(s\)](#)

CREATE A GROUP

1. Click on **Create group** button at the bottom of the screen.

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1050700 - The Test Club [Update password](#) [Logout](#)

Create/Maintain Card Groups

Branch:

Select a group(s) and choose an action:

Group Name	Description	Group Status	Number of Cards
<input type="checkbox"/> Default Group - 1050700	Default Group for business : 1050700	Active	1

[Create group](#) [Remove group](#) [Rename group](#)

2. Select the correct Branch from the drop down menu. If there is only one branch, you still need to use the drop down menu to select that branch.



The screenshot shows the ORCA Business Account Representative Training Manual interface. The top navigation bar includes the ORCA logo, the text "one regional card for all", the user name "1190 - Pierce Test 2", and links for "Update password" and "Logout". The left sidebar contains a "Business Account Orders" section with a "Shopping Cart" icon and a "Card Management" section with links for "Summary of Card Accounts", "Create / Maintain Branches", and "Create / Maintain Card Groups". The main content area is titled "Create/Maintain Card Groups - new group" and contains a form to "Create a new group". The form includes a "Branch *" dropdown menu, a "Group Name *" text field, and a "Description *" text field. A red oval highlights the "Branch *" dropdown menu, which is currently set to "Default Branch - 1190". The "Group Name" field contains the text "Test Active" and the "Description" field contains the text "Active Cards". At the bottom right of the form are "Back" and "Create group" buttons.

3. Enter a Group Name and Description. The group name must be alphanumeric. The field will not accept special characters.
4. Click on the **Create group** button.

The screen will refresh with a green **"Success"** message indicating the group was added.



Use the Back button or click on a button in the left navigation bar to move to a different page.

Note: Please wait 24 to 48 hours **BEFORE ordering** cards or **moving** cards to any newly created Group. If you move cards prior to this time, any products on the cards at the time you move them will be temporarily unavailable.

Note: After moving cards to the newly created Group, you must wait another 24 to 48 hours for this new actionlist to get downloaded to all devices. After that time, the cards must be tapped for them to become associated with this Group. (This tapping does not apply when you order new cards for the Group.) Once the cards have been tapped, you may order products for those cards. Any products on the cards at the time you move them should remain unaffected.

IMPORTANT: Although you may delete Groups, it is not a good practice unless you are positive that no cards remain in that Group since any cards that remain in that Group will also be deleted. You may choose to rename it, such as "Unused Group."

REMOVE A GROUP

IMPORTANT: Although you may delete Groups, it is not a good practice since any cards that remain in that Group will also be deleted. You may choose to rename it, such as "Unused Group."

1. Click the **checkbox** next to the Group to be removed

Business Account Orders

Shopping Cart

Current Order Summary

Card Management

Summary of Card Accounts

Create / Maintain Branches

Create / Maintain Card Groups

Agreement

Manage Agreement Details

Vanpool Subsidies

Contact

Contact Us

1159 - Pierce Transit Test Choice

Update password | Logout

Create/Maintain Card Groups

Branch: Choose

Select a group(s) and choose an action:

Group Name	Description	Group Status	Number of Cards
<input checked="" type="checkbox"/> 63 Pass	Local Pass	Active	0
<input type="checkbox"/> Active	Active cards	Active	0
<input type="checkbox"/> Default Group - 1159	Default Group for business : 1159	Active	5

Create group Remove group Rename group

Unblock Block Import Export

Add Card Move card(s)

Please note: you cannot delete a card group with cards still assigned to it. You must move the cards to another group before the group can be removed. However, first moving cards to another card group may not result in the desired change IF those cards are not tapped before you remove the group.

2. Click the **Remove Group** button. You will be taken to a confirmation page, where a list of groups designated for removal will be listed. Review this page carefully.

1159 - Pierce Transit Test Choice

Update password | Logout

Create/Maintain Card Groups - delete card groups

Confirm the deletion of the following group(s)

List of card groups to be deleted

Group Name	Description	Number of Cards
63 Pass	Local Pass	0

Cancel Confirm

3. Click **Confirm** button to delete designated groups.

The screen will refresh with a green **"Success"** message indicating the group was added.



Use the Back button or click on a button in the left navigation bar to move to a different page.

RENAME A GROUP

1. Click the **checkbox** next to the Group to be renamed.

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Business Account Orders

Shopping Cart

Current Order Summary

Card Management

Summary of Card Accounts

Create / Maintain Branches

Create / Maintain Card Groups

Agreement

Manage Agreement Details

Vanpool Subsidies

Contact

Contact Us

Create/Maintain Card Groups

Branch: Choose

Select a group(s) and choose an action:

Group Name	Description	Group Status	Number of Cards
<input checked="" type="checkbox"/> 63 Pass	Local Pass	Active	0
<input type="checkbox"/> Active	Active cards	Active	0
<input type="checkbox"/> Default Group - 1159	Default Group for business : 1159	Active	5

Create group Remove group **Rename group**

Unblock Block Import Export

Add Card Move card(s)

2. Click the **Rename Group** button.
3. Type the new Group Name and Description. The group name must be alphanumeric. The field will not accept special characters.

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1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

Shopping Cart

Current Order Summary

Card Management

Summary of Card Accounts

Create / Maintain Branches

Rename Card Group

Enter the details of the group below:
Fields marked with an asterisk (*) are required

Group Name * Pass 63

Description * Active cards

Back **Update**

4. Click **Update**.

The screen will refresh with a green **"Success"** message indicating the group was added.



Use the Back button or click on a button in the left navigation bar to move to a different page.

CARDS AND PRODUCTS ORDERING

Once a Business Account agreement is approved by the Lead Agency, the business can initiate card and/or product orders using the Business Account website. In most cases, orders will still need to be approved by the Lead Agency before they are filled.

Cards can be ordered with or without products loaded onto them, depending on the needs of the Business Account. Once cards have been purchased and distributed, additional products can be ordered for those cards on an ongoing basis.

ORDER CARDS

When you first login to your account, you will be at the Current Order Summary page.

A list of all current orders will be displayed, with their status noted (pending, approved, completed). If there are no orders, the list will be empty.

1. Click the **New Card Order** button at the bottom of the page and fill in the order. Remember you must select a branch and group for each order, even if only the default branch and group exist. You can always move cards between branches and groups at a later time as described in Card Management.

The screenshot shows the ORCA Business Account website. The header includes the ORCA logo, the text "one regional card for all", the user ID "1050701 - Online Test Club", and links for "Update password" and "Logout". The left sidebar contains navigation links: "Business Account Orders", "Shopping Cart", "Current Order Summary", "Card Management", "Summary of Card Accounts", "Create / Maintain Branches", "Create / Maintain Card Groups", "Agreement", "Manage Agreement Details", "Vanpool Subsidies", "Contact", "Contact Us", and "Reports", "Generate Reports". The main content area is titled "Order Summary" and "Current Orders Summary". It contains a text block explaining the order confirmation process. Below this is a table with one row of order data. At the bottom of the page, there are four buttons: "New Card Order" (circled in red), "New Product Order", "Cancel Orders", and "Unconfirm".

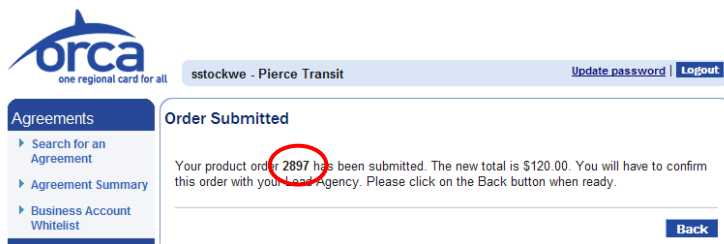
Order Number	Order Status	Order Month / Date Created	Order Item	Order Amount
8069	Completed	07/30/2008	Cards	\$ 202.50

- a. Select branch name.
- b. Select group name.
- c. Identify the quantity of cards to be ordered.

- d. Select the required card type.
(NOTE: only standard cards are available at this time.)
- e. Select Card Printing Template and Personalization file.
(NOTE: This is a future feature with an additional cost - Your Lead Agency will work with you on this option when available and if pertinent.)
- f. Identify Passenger Type (i.e. Adult, Youth).
- g. Type any special handling instructions (i.e. shipping instructions).
- h. Enter any notes into the Notes log.
- i. Any card fee will show up here.

NOTE: At this point in the order process, you can either add products (passes, e-purse, etc) to the card order OR you can proceed to check out. If you wish to have products loaded on the cards at the time of the card order, proceed with Step 2 below. If you wish to order cards with no product, click Next and move to Step 3 below.

2. Add products to your cards using these steps:
 - a. Select Program – Click on the **Program** type (Passport, e-voucher, Choice) for the products you wish to add to the card order.
 - b. Click the **Next** button. The Create New Order – Add Products page is displayed.
 - c. Select the products you want loaded on your card(s).
3. Click the **Next** button and the **Order Submitted** page will display with your order number and the message that the order must be confirmed before it can be approved by your Lead Agency. The Business Account is responsible for confirming the order so it can be approved.



4. At this point you will need to **Confirm** your order. Before you confirm the order, you can view it by clicking on the Back button on the Order Submitted confirmation page or by clicking on the order number in the Shopping Cart. You can also make changes to any field in the order at this time.

5. Click **Shopping Cart** on left navigation bar. This page displays a list of Pending Orders. These are orders that have been placed on the Current Order Summary page and are waiting to be confirmed.
6. Select order(s) you want to confirm. You should confirm an order before the 10th of the month prior to the month when the pass will be valid.

NOTE: Once confirmed by you, your Lead Agency needs to approve the order before it is processed and shipped. Once the Lead Agency approves your order, it cannot be changed.

NOTE: If you are paying by credit card, your order is automatically processed after you confirm it, and does not require approval from the Lead Agency.

7. Once you confirm an order but until it is approved by your Lead Agency, you can still modify or cancel the order. To do so, click **Current Order Summary** on the left navigation bar.
 - a. Select the order you want to modify or cancel.
 - b. Click **Unconfirm** order. The order will be listed as Pending in the Shopping Cart. You can click on the order number, modify it, and then proceed through the confirmation process. You can also cancel the order by selecting the order and clicking Remove from the Shopping Cart. A Cancel Order confirmation screen will display.
 - c. Click **Cancel Orders** to complete the cancellation process. The order will be listed as Cancelled in the Shopping cart.

ORDER PRODUCTS ONLY

Once you have your cards, you can add products to them as needed. If you are buying monthly passes, you will need to order new pass loads every month. You may also wish to load value into an e-purse or an e-voucher. Products ordered via the Business Account website will be automatically loaded onto the cards when they are presented to an ORCA device via the Actionlist process. To order products after you already have your ORCA cards:

1. When you login the Current Order Summary page will open. If you are already in your account and on a different page, click **Current Order Summary** on left navigation bar. This page displays a list of all current orders.
2. Click the **New Product Order** button at bottom of page. You will be taken to the Create Product Order page:

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary
- Card Management**
 - Summary of Card Accounts
 - Create / Maintain Branches
 - Create / Maintain Card Groups
- Agreement**
 - Manage Agreement Details
 - Vanpool Subsidies

Order Summary

Current Orders Summary

This is a list of your current orders. Select any orders you wish to confirm or unconfirm. Orders may not be unconfirmed after the 10th of the month. To modify or cancel a confirmed order after the 10th of the month you must [contact your Lead Agency](#). Click on an order to view more details.

One item found. Page: 1

Order Number	Order Status	Date Created	Order Item	OrderAmount
<input type="checkbox"/> 3011	Completed	05/04/2009	Cards	\$ 315.00

One item found. Page: 1

[New Card Order](#) [New Product Order](#) [Cancel Orders](#) [Unconfirm](#)

You have 3 choices to create your order. You can create a new order from scratch, copy last month's order, or import an order from an internal spreadsheet.

CREATE A NEW PRODUCT ORDER

1. Click on the **Create** button. You will be taken to the Order Management page.

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Agreements

- Search for an Agreement
- Agreement Summary
- Business Account Whitelist

Programs

- Electronic Voucher Programs
- Business Choice Programs
- Vanpool Subsidies

Create Product Order

Create a new Product Order: [Create](#)

Or

Create a Product Order by copying the previous approved Product Order: [Copy](#)

Or

Create a Product Order by importing from a file: [Browse...](#)

[Import](#)

[Cancel](#)

2. Select branch name

3. Select group name

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Order Management

[Order Creation](#)

1. Select Cards » 2. Select Programs » 3. Select Products

Select Group or Cards

Branch: Default Branch - 947

Group Name: Default Group - 947

Or (to order for a single card, leave the to field blank)

From:	To:
From:	To:
From:	To:
From:	To:

[Add Range](#)

[Add Products](#)

OR Upload Order from File

File: [Browse...](#) [Upload Order](#)

[Cancel](#)

4. For a single card, enter the card serial number. For multiple cards, enter the range of serial numbers. More than one range may be entered.
5. For all cards in the group chosen, click the **Add Products** button
6. Select the Program (i.e. Business Choice) and then click the **Next** button

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Order Management

1. Select Cards » 2. Select Programs » 3. Select Products

Select Programs

Business Choice Program

☒ Business Choice

[Cancel](#) [Back](#) [Next](#)

7. Select the products you want to be loaded on your card(s). The products available for you to choose will be displayed.

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Create New Order - Add Products

1. Select Cards » 2. Select Programs » 3. Select Products

Select Products

[Cancel](#) [Back](#) [Next](#)

☒ Business Choice

Purse Amount: \$

<input type="checkbox"/> Kitsap Transit Full Fare Pass	Select Period <input type="text"/>
<input type="checkbox"/> Kitsap Transit Reduced Fare Pass	Select Period <input type="text"/>
<input type="checkbox"/> Kitsap Transit Worker/Driver Full Fare Pass	Select Period <input type="text"/>
<input type="checkbox"/> Metro Annual Reduced Fare Pass	Select Period <input type="text"/>
<input type="checkbox"/> Metro Monthly Reduced Fare Pass	Select Period <input type="text"/>
<input type="checkbox"/> Metro Vanpool Bookkeeper Pass	Select Period <input type="text"/>
<input type="checkbox"/> Pierce Transit Institutional Vanpool Pass	Select Period <input type="text"/>
<input type="checkbox"/> PugetPass \$0.50	Select Period <input type="text"/>
<input type="checkbox"/> PugetPass \$0.75	Select Period <input type="text"/>
<input type="checkbox"/> PugetPass \$1.00	Select Period <input type="text"/>
<input type="checkbox"/> PugetPass \$1.25	Select Period <input type="text"/>
<input type="checkbox"/> PugetPass \$1.50	Select Period <input type="text"/>
<input type="checkbox"/> PugetPass \$1.75	Select Period <input type="text"/>

8. Click the **Next** button and the **Order Submitted** page will display with your order number and the message that the order must be confirmed before it can be approved by your Lead Agency. The Business Account is responsible for confirming the order so it can be approved.

ORCA one regional card for all sstockwe - Pierce Transit [Update password](#) [Logout](#)

Order Submitted

Your product order **2897** has been submitted. The new total is \$120.00. You will have to confirm this order with your Lead Agency. Please click on the Back button when ready.

[Back](#)

NOTE: Clicking the Back button takes you to the Order Summary Page. That page will not show the order until it has been confirmed. Please proceed to the next step as shown below.

9. Click **Shopping Cart** on the left navigation bar. The page may show “validating” in the order status. The order cannot be confirmed until the order status shows “pending.”

NOTE: The validation process may take as long as 45 minutes, depending on the website activity. If validation does not occur within 5 minutes, please logout and return to complete your order later.

The screenshot shows the ORCA Business Account interface. The left navigation bar includes links for Business Account Orders, Shopping Cart, Card Management, Agreement, and Contact. The Shopping Cart section is active, displaying a table of pending orders. One order is listed with Order Number 3036, Status Validating, Date Created 05/15/2009, Order Item Products, and Order Amount \$63.00. A red circle highlights the 'Validating' status, and a red arrow points from a text box to it. The text box contains the instruction: 'Order status must indicate “Pending” before you can confirm the order.' Below the table, there are buttons for 'Remove from shopping cart' and 'Confirm orders'.

Order Number	Order Status	Date Created	Order Item	OrderAmount
<input type="checkbox"/> 3036	Validating	05/15/2009	Products	\$ 63.00

NOTE: The following error message will appear if you try to confirm the order while it is still validating.

The screenshot shows the ORCA Business Account interface with an error message displayed. The error message is: 'PLEASE CORRECT THE FOLLOWING ERROR(S): One or more of the orders you selected to confirm is not pending. You can only confirm orders that are pending.' Below the error message, the same table of pending orders is shown, with the order status 'Validating'. The 'Confirm orders' button is highlighted in blue.

Order Number	Order Status	Date Created	Order Item	OrderAmount
<input type="checkbox"/> 3036	Validating	05/15/2009	Products	\$ 63.00

10. Once the order status indicates "Pending," select order(s) you want to confirm. You should confirm an order before the 10th of the month prior to the month when the pass will be valid.

NOTE: Once confirmed by you, your Lead Agency needs to approve the order before it is processed and shipped. Once the Lead Agency approves your order, it cannot be changed. Lead Agencies will typically approve orders at least once per normal business workday.

NOTE: If you are paying by credit card, your order is automatically processed after you confirm it, and does not require approval from the Lead Agency.

11. Once you confirm an order but until it is approved by your Lead Agency, you can still modify or cancel the order. To do so, click **Current Order Summary** on the left navigation bar.

NOTE: You can also export a pending or confirmed order –prior to Lead Agency approval. See the section on **Export a Product Order** for the steps.

- a. Select the order you want to modify or cancel.
- b. Click **Unconfirm** order. The order will be listed as Pending in the Shopping Cart. You can click on the order number, modify it, and then proceed through the confirmation process. You can also cancel the order by selecting the order and clicking Remove from the Shopping Cart. A Cancel Order confirmation screen will display.
- c. Click **Cancel Orders** to complete the cancellation process. The order will be listed as Cancelled in the Shopping cart.

COPY A PRODUCT ORDER

An additional method of creating product orders is to **Copy** the last approved product order.

1. Select **Current Order Summary** from the left navigation bar.
2. Select **New Product Order**.
3. Select **Copy**.

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Agreements

- Search for an Agreement
- Agreement Summary
- Business Account Whitelist

Programs

- Electronic Voucher Programs
- Business Choice Programs
- Vanpool Subsidies

Create Product Order

Create a new Product Order: [Create](#)

Or

Create a Product Order by copying the previous approved Product Order: [Copy](#)

Or

Create a Product Order by importing from a file: [Browse...](#)

[Import](#)

[Cancel](#)

- This step will take you to the Current Product Order Summary page where you can confirm or, if necessary, cancel your new order.

IMPORT A PRODUCT ORDER

At any future date, if you wish to duplicate a previous order - the same products, for the same cards – and the order was exported, you can easily import the order to create a duplicate order.

NOTE: You must always add the first order directly into the ORCA system. Once the order is completed and paid for, you can Export it in your preferred format and use it for your next month's order.

- Select **Current Order Summary** from the left navigation bar.
 - Select **New Product Order**.
 - On the **Create Product Order** page, select **Browse** and select the **Exported product** order file.

NOTE: Always check your Exported order to check that you need the same cards and products. Make any necessary changes to your file prior to Importing.

- On the **Create Product Order** page, select **Import**. This action will take you to the Current Order Summary Page where you can confirm or, if necessary, cancel your new order.

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Agreements

- Search for an Agreement
- Agreement Summary
- Business Account Whitelist

Programs

- Electronic Voucher Programs
- Business Choice Programs
- Vanpool Subsidies

Create Product Order

Create a new Product Order: [Create](#)

Or

Create a Product Order by copying the previous approved Product Order: [Copy](#)

Or

Create a Product Order by importing from a file: [Browse...](#)

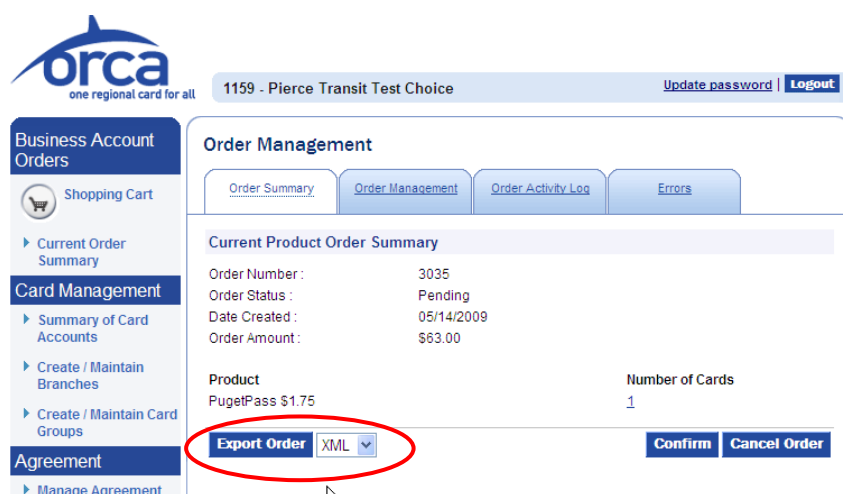
[Import](#)

[Cancel](#)

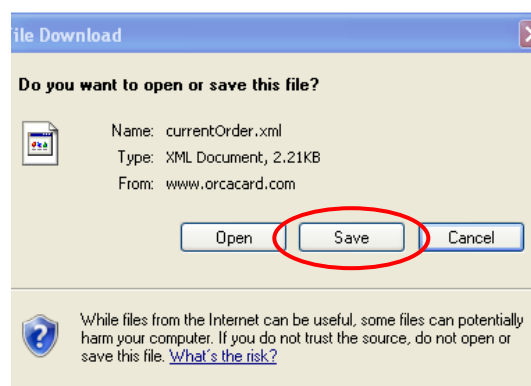
EXPORT A PRODUCT ORDER

Pending and Confirmed orders can be exported and saved for later duplication through the Export Order process.

1. Select the unapproved order that you wish to export.
 - a. Select **Pending** orders from the Shopping Cart.
 - b. Select **Confirmed** orders from Current Order Summary.
2. Selecting the order takes you to the Order Summary tab. From here, select a file type from the drop down list next to the **Export Order** button. The file can be saved as either XML or CSV.



3. Select **Export Order** and choose a location to save your file.



MANAGE PENDING ORDERS

Before orders are confirmed they can be altered.

Click on the **Shopping Cart** in the left navigation bar. A list of Pending Orders will be displayed. These are orders that have been placed on the Current Order Summary page and are waiting to be confirmed. You can change the order by clicking on the order number and adding or removing products.

You also can remove these orders from the Shopping Cart by clicking on **Remove Order from Shopping Cart**.

PAY FOR YOUR ORDER

Paying for your order may differ depending upon the type of account you have. Please see specifics below.

BUSINESS CHOICE ACCOUNTS

All orders for Business Choice agreements require prepayment. During the creation of your agreement, your Lead Agency will ask what form of payment you would like to use (i.e., credit card, debit card, check, or money order). This information will be entered into your account. If you wish to change the form of payment at a later time, contact your Lead Agency representative.

If you select credit or debit card payment, your payment will be processed when you place your order via the website. After you enter your card details, your card will be validated online. Once payment is validated, your order will be approved. Your credit or debit card information is not retained after it is processed. Each time you place an order you will enter the card information. If at a later time, you wish to use another form of payment, contact your Lead Agency representative.

If you designate payment by check or money order, you will print the final order summary and mail it with your check or money order to the designated address of your Lead Agency. Once your order summary and payment are received, your order will be approved.

PASSPORT ACCOUNTS

Your Lead Agency determines payment requirements for Passport Agreements. Typically, once your agreement is approved, an invoice will be generated according to the terms of your agreement, and mailed to you for payment. Timely payment is required to maintain an active agreement.

NOTE: Failure to make payment by the invoice deadline will result in the blocking of cards and products until payment is received.
No refunds due to late payments will be provided.

AUTOLOAD

The Autoload function is not available to the individual cardholder when the card is associated to a Business Account. The Business Account representative should provide this information to each individual as the card is issued.

ACCOUNT MANAGEMENT

Business Accounts can manage cards via branches and groups, or individually. This section describes how a Business Account Representative does the following tasks:

- **Manage groups** – Blocking and unblocking groups, importing/exporting groups, and moving cards between groups
- **Manage individual cards** – Block and unblocking cards and products
- **Change e-voucher settings** for employee cards
- **View card account history**

MANAGE GROUPS

A Business can block entire groups of cards. For example, when employees leave the company, the Business may move these cards to a Group for former employees and block that entire group of cards. Blocking a group means that no product purchased by the Business can be used by the cardholder. Blocking and unblocking occur through the Actionlist process.

BLOCK CARD GROUPS

1. Select **Create/Maintain Card Groups** on left navigation bar.
2. Select the group to be blocked by checking the **checkbox** next to the group name.
3. Select the **Block** button. You will be taken to the following screen and will need to select a reason for blocking the group.

NOTE: Cards blocked because they were lost or stolen cannot be unblocked.

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Create/Maintain Card Groups - block card groups

Confirm the blocking of the cards in the following group(s)

After a group of cards has been blocked any business account products on the cards can no longer be used.

Block Reason: **Blocked - Lost or Stolen Card**

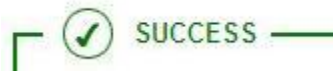
List of card groups to be blocked

Group Name	Description	Number of Cards
New Test Club	newest branch of test club	0

[Cancel](#) [Confirm](#)

4. Click the **Confirm** button.

The screen will refresh with a green **"Success"** message on the Create/Maintain Card Groups page indicating the group was blocked.



Use the Back button or click on a button in the left navigation bar to move to a different page.

UNBLOCK CARD GROUPS

If the Group was blocked for a temporary reason, it can be unblocked using the reverse function on the website.

NOTE: Cards blocked because they were lost or stolen cannot be unblocked.

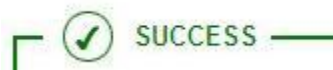
1. Select **Create/Maintain Card Groups** on left navigation bar.
2. Select the group to be unblocked by checking the **checkbox** next to the group name.
3. Select the **Unblock** button. You will be taken to the following screen, and will need to confirm that you want to unblock all cards within this group.

The screenshot shows the Orca website interface. At the top left is the Orca logo with the tagline "one regional card for all". To the right of the logo is the text "1050700 - The Test Club". Further right are links for "Update password" and "Logout". Below this is a section titled "Create/Maintain Card Groups - unblock card groups". Inside this section is a heading "Confirm the unblocking of the cards in the following group(s)". Below the heading is the text "List of card groups to be unblocked". This is followed by a table with three columns: "Group Name", "Description", and "Number of Cards". The table contains one row with the values "New Test Club", "newest branch of test club", and "0". At the bottom right of the table are two buttons: "Cancel" and "Confirm".

Group Name	Description	Number of Cards
New Test Club	newest branch of test club	0

4. Click the **Confirm** button.

The screen will refresh with a green **"Success"** message on the Create/Maintain Card Groups page indicating the group was unblocked.



Use the Back button or click on a button in the left navigation bar to move to a different page.

IMPORT A CARD GROUP

If you are moving large numbers of cards between groups, regularly blocking or unblocking batches of cards, or assigning cards to groups from an internal system for tracking benefits, you may want to use the import/export function. Details on file structure are provided in Appendix A.

1. Click on the **Create/Maintain Card Groups** page.

ORCA one regional card for all 1050700 - The Test Club Update password Logout

Business Account Orders Shopping Cart

Card Management

Create / Maintain Card Groups

Create / Maintain Card Groups

Summary of Card Accounts

Create / Maintain Branches

Agreement

Create/Maintain Card Groups

Branch: Default Branch - 1050700

Select a group(s) and choose an action:

Group Name	Description	Group Status	Number of Cards
<input type="checkbox"/> Default Group - 1050700	Default Group for business : 1050700	Active	1

Create group Remove group Rename group

Unblock Block Import Export Move card(s)

2. Click the **Import** button. The Upload Card Groups page will be displayed.

ORCA one regional card for all 1050700 - The Test Club Update password Logout

Business Account Orders Shopping Cart

Card Management

Create / Maintain Card Groups

Summary of Card Accounts

Create / Maintain Branches

Create / Maintain Card Groups

Upload Card Group File

Fields marked with an asterisk (*) are required

Branch: * Choose

File: * Browse...

Cancel Upload File

3. Select the **Branch** where the card group file will be uploaded.
4. Click the **Browse** button and locate the .xml file to be imported.
5. Click **Upload File** button.

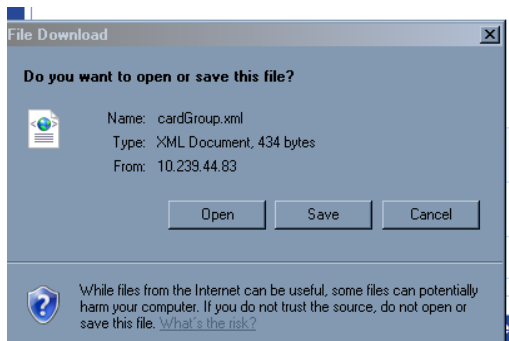
The screen will refresh with a green **"Success"** message and the list of groups will be displayed.



Use the Back button or click on a button in the left navigation bar to move to a different page.

EXPORT A CARD GROUP

1. Click on the **Create/Maintain Card Groups** page
2. Select the appropriate card groups by clicking the **checkbox** next to the group.
3. Click the **Export** button.
4. A pop-up asks if you want to Open or Save the file.



5. Click **Save** and take note of the location where the file is begin saved.
6. Depending on your computer settings, you may or may not have to Close the download pop-up window once the download is completed.
7. The display returns to the Create/Maintain Card Groups page.

MOVE CARDS BETWEEN GROUPS

A business can move cards between groups. These groups can be within the same branch or within other branches in the same agreement. Moving cards occurs through the Actionlist process.

1. At the **Create/Maintain Card Groups** page.
2. Select the **Group** in which the cards you want to move are located.

3. Click the **Move Card(s)** button.

4. The **Create/Maintain Card Groups – move cards** page is displayed.
5. Use drop down list to identify the **destination Group** to which the cards should be assigned.
6. Click the **checkbox** to select the card or cards to move, or use the **Select All** checkbox.

7. Click the **Move** button. A Create/Maintain Card Groups – move cards confirmation page will be displayed.

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1050700 - The Test Club [Update password](#) [Logout](#)

Create/Maintain Card Groups - move cards

Move card(s) from group

1. Select cards » 2. Confirmation

Confirm the moving of the following cards from Default Group - 1050700:

99914172

[Cancel](#) [Move](#)

8. Click **Move** to complete the reassignment.

The screen will refresh with a green **"Success"** message indicated the cards have been moved.



Use the Back button or click on a button in the left navigation bar to move to a different page.

NOTE: You must allow up to 48 hours for actionlisting to occur **BEFORE** moving a card to a NEW card group. If you do not allow this actionlisting to occur, the card will not work.

ADD A CARD

You can add a card to specific group using the Add card function.

1. Click on the **Create/Maintain Card Groups** on the left navigation bar.
2. Select the branch and group in which you want to add the card.
3. Click **Add card**.

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1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Create/Maintain Card Groups

Branch: Choose

Select a group(s) and choose an action:

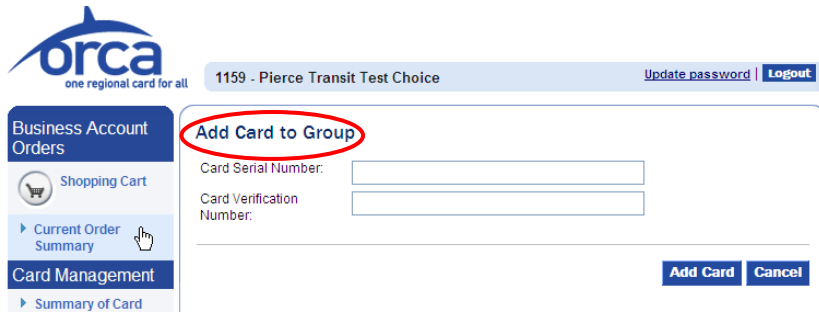
Group Name	Description	Group Status	Number of Cards
<input type="checkbox"/> Default Group - 1159	Default Group for business : 1159	Active	4
<input type="checkbox"/> Pass 63	Active cards	Active	1

[Create group](#) [Remove group](#) [Rename group](#)

[Unblock](#) [Block](#) [Import](#) [Export](#)

[Add Card](#) [Move card\(s\)](#)

4. You will be taken to the **Add Card to Group** screen.



The screenshot shows the ORCA Business Account Orders page. The 'Add Card to Group' link is circled in red. The page displays the following elements:

- ORCA logo: one regional card for all
- Page title: 1159 - Pierce Transit Test Choice
- Links: [Update password](#), [Logout](#)
- Left sidebar:
 - Business Account Orders
 - Shopping Cart
 - Current Order Summary
 - Card Management
 - Summary of Card
- Main content area:
 - Add Card to Group** (circled in red)
 - Card Serial Number:
 - Card Verification Number:
 - [Add Card](#) [Cancel](#)

5. Enter the **Card Serial Number** (located in the lower left corner of the card) and the **Card Verification Number** (three digits, located in the lower right corner of the card).



6. Click **Add card** to complete the action.

MANAGE INDIVIDUAL CARDS

A business can block and unblock individual cards and individual products on cards. These actions occur through the Actionlist process.

BLOCK A CARD

A Business Account representative can block a card for the following reasons:

- Card is lost or stolen;
- Card is damaged or defective
- Card is returned by the employee.

Blocking an individual card blocks **ALL** products loaded on that card.

NOTE: Cards blocked because they were lost or stolen cannot be unblocked.

NOTE: If you need a replacement card or want to transfer products from the card to be blocked to a card you have in stock, please contact your Lead Agency before you take any action.

1. To block a card, click on the **Summary of Card Accounts** page.

ORCA one regional card for all 1050700 - The Test Club Update password Logout

Business Account Orders

Shopping Cart

Current Order Summary

Card Management

Summary of Card Accounts

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch Choose

Groups:

2. Select the card to block using any of the search criteria available.
 - a. Use the Branch and Group criteria, or
 - b. Search by a specific card serial number, or
 - c. Search by card status (e.g. Active or Blocked), or
 - d. Search by type of product on the card.

ORCA one regional card for all 1050700 - The Test Club Update password Logout

Business Account Orders

Shopping Cart

Current Order Summary

Card Management

Summary of Card Accounts

Create / Maintain Branches

Create / Maintain Card Groups

Agreement

Manage Agreement Details

Vanpool Subsidies

Contact

Contact Us

Reports

Generate Reports

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch Choose

Groups:

OR

Card Serial Number:

Cardholder ID:

Card Status:

Products:

View

- Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

- Generate Reports

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch: Choose

Groups:

OR

Card Serial Number:

Card Status:

Products: PugetPass \$1.75

[View](#)

5 items found, displaying all items. Page: 1

Card Serial Number
10106353
10106354
10106355
10106356
10106357

5 items found, displaying all items. Page: 1

- Select the card you wish to block by clicking the **card serial number**.
- The Card Account details – for card “xxxxxxx” will appear.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

Card Account Details - for card 10106353

Card Account Details

View the details of this card below.

[Back to Card Group](#)

[Card Details](#) [Card Order History](#)

Card Serial Number: 10106353

Card Status: Active

Voucher Revalue Type: None

[Block Card](#)

[Save](#)

Current Orders - for card 10106353

Current Confirmed and Pending Orders

Product	Valid for	Amount
---------	-----------	--------

6. Click **Block Card**.
7. Select the **reason** for blocking the card from the drop down menu.

NOTE: Cards blocked because they were lost or stolen cannot be unblocked.

ORCA one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Card Account Details - block card

Confirm the blocking of the card with serial number: 10106353

Block Reason: Blocked - Lost or Stolen Card

[Cancel](#) [Confirm](#)

中文 - Chinese | 한국어 - Korean | Русский - Russian | Español - Spanish | Tagalog - Tagalog | Tiếng Việt - Vietnamese

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8. Click **Confirm** to complete the block card action. The Card Account Details screen will be displayed and will indicate that Card Status as Blocked.

ORCA one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

[Shopping Cart](#)

▶ [Current Order Summary](#)

Card Management

▶ [Summary of Card Accounts](#)

▶ [Create / Maintain Branches](#)

▶ [Create / Maintain Card Groups](#)

Agreement

▶ [Manage Agreement Details](#)

▶ [Vanpool Subsidies](#)

Contact

▶ [Contact Us](#)

Reports

Card Account Details - for card 10106357

Card Account Details

View the details of this card below.

[Card Details](#) [Card Order History](#)

[Back to Card Group](#)

Card Serial Number: 10106357

Card Status: Blocked [Unblock Card](#)

Voucher Revalue Type: None

[Save](#)

Current Orders - for card 10106357

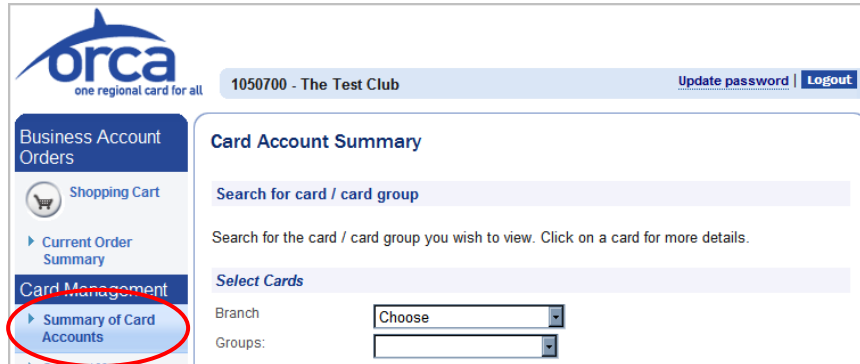
Current Confirmed and Pending Orders

Product	Valid for	Amount
---------	-----------	--------

UNBLOCK A CARD

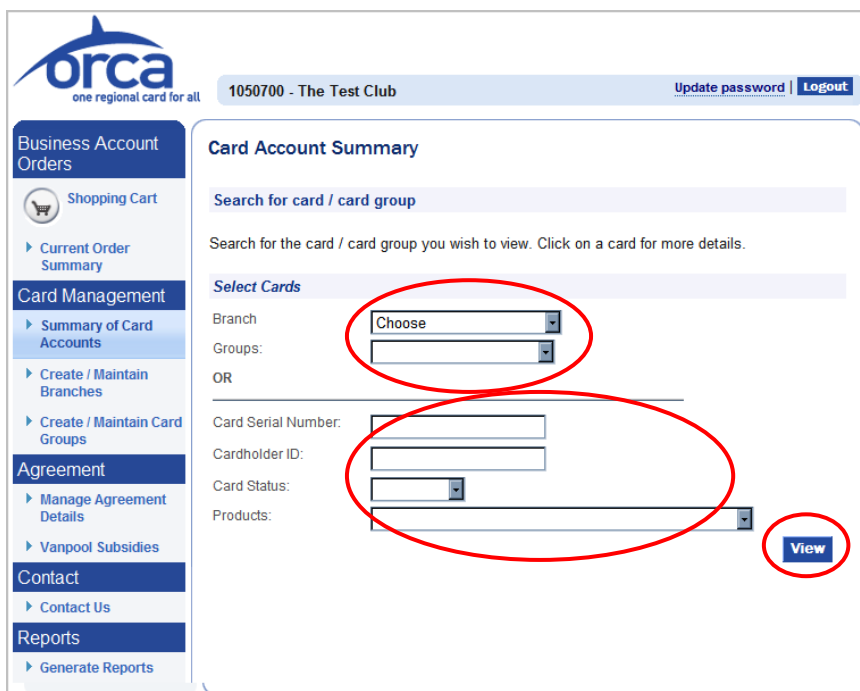
A Business Account representative can unblock a card that has previously been blocked, except if it was blocked because it was lost or stolen.

1. To unblock a card, click on the **Summary of Card Accounts** page.



The screenshot shows the ORCA Business Account interface. The left sidebar contains a menu with 'Summary of Card Accounts' highlighted with a red circle. The main content area is titled 'Card Account Summary' and includes a search bar, a description, and a 'Select Cards' section with dropdown menus for 'Branch' and 'Groups'.

2. Select the card to unblock using any of the search criteria available.
 - a. Use the Branch and Group criteria, or
 - b. Search by a specific card serial number, or
 - c. Search by card status (e.g. Active or Blocked), or
 - d. Search by type of product on the card.



The screenshot shows the ORCA Business Account interface with the 'Search for card / card group' page. The left sidebar contains a menu with 'Summary of Card Accounts' highlighted with a red circle. The main content area is titled 'Card Account Summary' and includes a search bar, a description, and a 'Select Cards' section with dropdown menus for 'Branch' and 'Groups'. Below these are search criteria: 'Card Serial Number', 'Cardholder ID', 'Card Status', and 'Products'. The 'View' button is also highlighted with a red circle.

- Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.

ORCA one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

- Generate Reports

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch: Choose

Groups:

OR

Card Serial Number:

Card Status:

Products: PugetPass \$1.75 [View](#)

5 items found, displaying all items. Page: 1

Card Serial Number
10106353
10106354
10106355
10106356
10106357

5 items found, displaying all items. Page: 1

- Select the card you wish to unblock by clicking the **card serial number**.

- The Card Account details – for card “xxxxxxx” will appear.

ORCA one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

Card Account Details - for card 10106357

Card Account Details

View the details of this card below.

[Card Details](#) [Card Order History](#) [Back to Card Group](#)

Card Serial Number: 10106357

Card Status: Blocked [Unblock Card](#)

Voucher Revalue Type: None [Save](#)

Current Orders - for card 10106357

Current Confirmed and Pending Orders

Product	Valid for	Amount
---------	-----------	--------

6. Click **Unblock Card**.

NOTE: Cards blocked because they were lost or stolen cannot be unblocked.

7. Click **Confirm** to complete the unblock card action. The Card Account Details screen will be displayed and will indicate that Card Status as Active.

The screenshot shows the ORCA website interface. The left sidebar contains navigation links: Business Account Orders, Shopping Cart, Current Order Summary, Card Management (Summary of Card Accounts, Create / Maintain Branches, Create / Maintain Card Groups), and Agreement (Manage Agreement Details). The main content area is titled 'Card Account Details - for card 10106357'. It includes a 'Card Account Details' section with the text 'View the details of this card below.' and a 'Back to Card Group' button. Below this, there are tabs for 'Card Details' and 'Card Order History'. The 'Card Details' tab is active, showing the following information: Card Serial Number: 10106357, Card Status: Active, and Voucher Revalue Type: None. There is a 'Block Card' button and a 'Save' button at the bottom right.

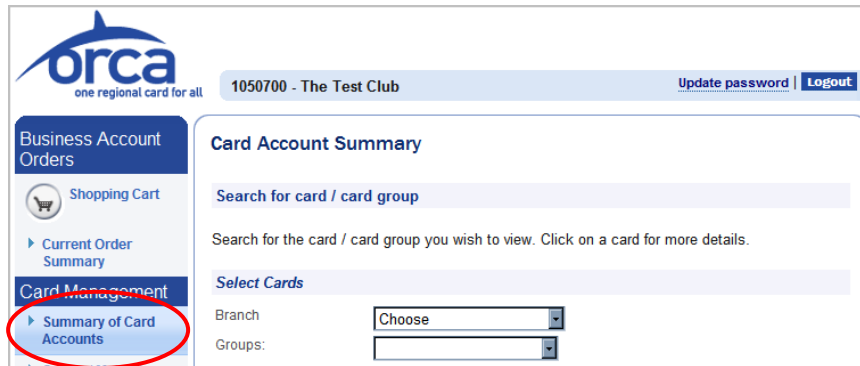
Note: If you receive the following error message, you previously selected the reason to block the card as "Blocked-Lost or Stolen Card."

The screenshot shows the ORCA website interface. The left sidebar contains navigation links: Business Account Orders, Shopping Cart, Current Order Summary, Card Management (Summary of Card Accounts, Create / Maintain Branches, Create / Maintain Card Groups), and Agreement (Manage Agreement Details). The main content area is titled 'Card Account Details - for card 10106353'. It includes a 'Card Account Details' section with the text 'View the details of this card below.' and a 'Back to Card Group' button. Below this, there are tabs for 'Card Details' and 'Card Order History'. An error message is displayed in a red box: 'PLEASE CORRECT THE FOLLOWING ERROR(S): Cannot unblock a card that has been reported lost or stolen.'

BLOCK A PRODUCT

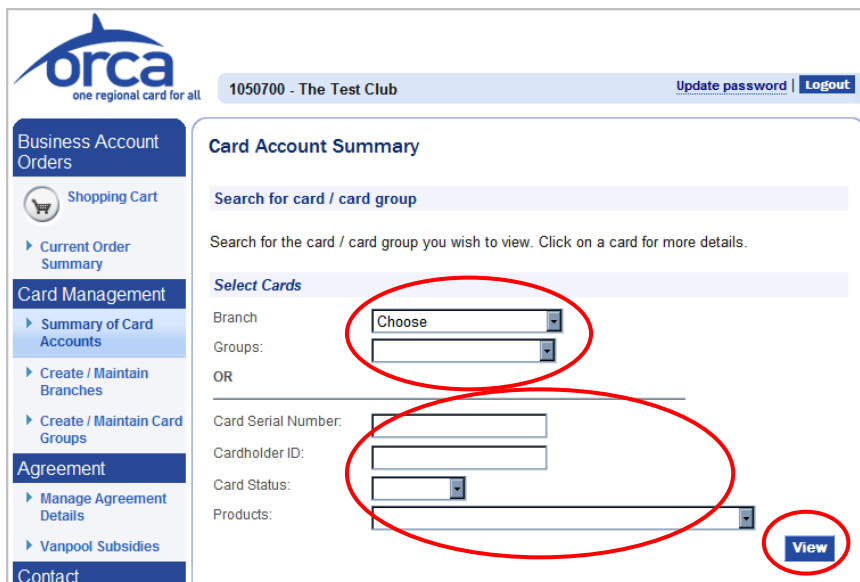
A Business Account representative can block products on a card. For example, a representative may choose to do this if they have issued a card to an employee who is leaving the company and the company has agreed to allow the employee to retain the card. The Business Account representative can block the products that they have purchased and loaded on the card, thus allowing the card to still be used for private use by the exiting employee. Blocking a product occurs through the Actionlist process.

1. To block a product, click on the **Summary of Card Accounts** page.



The screenshot shows the ORCA Business Account interface. The left sidebar contains a 'Card Management' section with a red circle around the 'Summary of Card Accounts' link. The main content area is titled 'Card Account Summary' and includes a search bar, a description, and a 'Select Cards' section with dropdown menus for 'Branch' and 'Groups'.

2. Select the card that you want to block the product on using any of the search criteria available.
 - a. Use the Branch and Group criteria, or
 - b. Search by a specific card serial number, or
 - c. Search by card status (e.g. Active or Blocked), or
 - d. Search by type of product on the card.



This screenshot shows the same ORCA Business Account interface, but with the search criteria fields and the 'View' button circled in red. The 'Select Cards' section includes dropdowns for 'Branch' and 'Groups', followed by an 'OR' separator. Below this are input fields for 'Card Serial Number', 'Cardholder ID', 'Card Status', and 'Products'. A red circle also highlights the 'View' button at the bottom right of the search area.

3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

- Generate Reports

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch: Choose

Groups:

OR

Card Serial Number:

Card Status:

Products: PugetPass \$1.75 [View](#)

5 items found, displaying all items. Page: 1

Card Serial Number
10106353
10106354
10106355
10106356
10106357

5 items found, displaying all items. Page: 1

4. Click the **serial number** of the card that you want to block products on. The **Card Account Details – for card "xxxxxxx"** will appear.
5. Click the **Block/Unblock Products** button at the bottom of the page.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

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- Contact Us

Reports

- Generate Reports

Card Account Details - for card 10106353

Card Account Details

View the details of this card below.

[Back to Card Group](#)

[Card Details](#) [Card Order History](#)

Card Serial Number: 10106353

Card Status: Active [Block Card](#)

Voucher Revalue Type: None [Save](#)

Current Orders - for card 10106353

Current Confirmed and Pending Orders

Product	Valid for	Amount
Product List		
Product Name	Remaining Value	
E-purse	Value: \$0.00	
PugetPass \$1.75	Valid for: May 2009	

[Block/Unblock Products](#)

6. Choose the **product** you want to block, click on the **Blocked** button, and choose the **Blocking Reason** from the drop down menu.

orca
one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

Shopping Cart

Current Order Summary

Card Management

Summary of Card Accounts

Create / Maintain Branches

Create / Maintain Card Groups

Agreement

Manage Agreement Details

Block/Unblock Product(s) details

Block/Unblock Product(s)

	Blocked	Unblocked
<input checked="" type="checkbox"/> E-purse	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> PugetPass \$1.75	<input type="radio"/>	<input checked="" type="radio"/>

Blocking Reason: Other

Unblocking Reason:

[Update](#) [Back](#)

7. Click the **Update** button.
8. You will receive a message asking if you are sure you want to block the product. Click the appropriate answer.

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1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

Shopping Cart

Current Order Summary

Are you sure you wish to block/unblock the product(s) ?

[Yes](#) [No](#)

The screen will refresh with a green **“Confirmation”** message indicating the selected products have been actionlisted to be blocked.

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one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

Shopping Cart

Current Order Summary

Card Management

Summary of Card Accounts

Block/Unblock Product(s) details

Block/Unblock Product(s)

CONFIRMATION

Success:

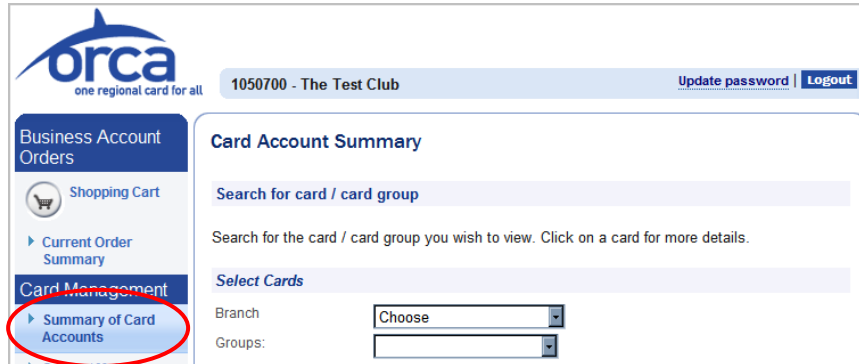
→ The selected product/s have been actionlisted to be blocked.

Use the Back button or click on a button in the left navigation bar to move to a different page.

UNBLOCK A PRODUCT

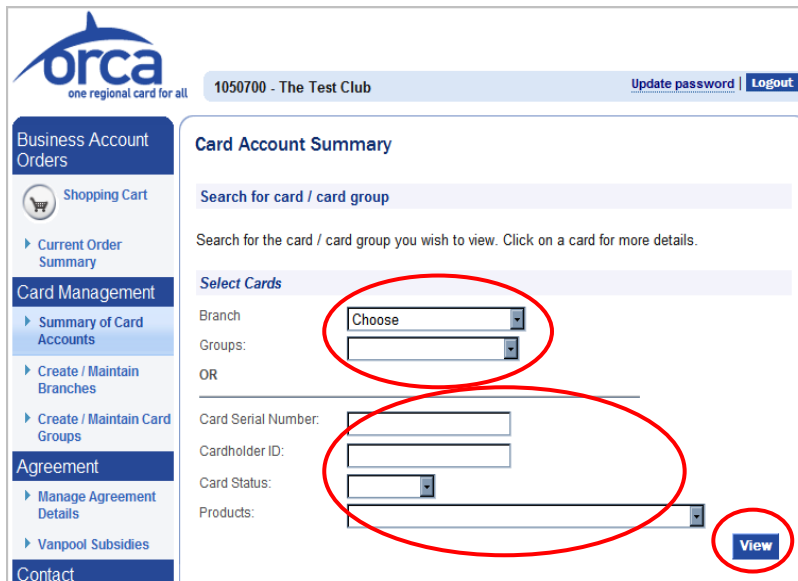
A Business Account representative can unblock products. Unlocking a product is accomplished through the Actionlist process.

1. To unblock a product, click on the **Summary of Card Accounts** page.



The screenshot shows the ORCA Business Account interface. The left sidebar contains a 'Card Management' section with a red circle around the 'Summary of Card Accounts' link. The main content area is titled 'Card Account Summary' and includes a search bar, a description, and a 'Select Cards' section with dropdown menus for 'Branch' and 'Groups'.

2. Select the card that you want to block the product on using any of the search criteria available.
 - a. Use the Branch and Group criteria, or
 - b. Search by a specific card serial number, or
 - c. Search by card status (e.g. Active or Blocked), or
 - d. Search by type of product on the card.



The screenshot shows the ORCA Business Account search interface. The search criteria fields (Branch, Groups, Card Serial Number, Cardholder ID, Card Status, Products) and the 'View' button are circled in red. The 'View' button is located at the bottom right of the search criteria section.

3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

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- Contact Us

Reports

- Generate Reports

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch: Choose

Groups:

OR

Card Serial Number:

Card Status:

Products: PugetPass \$1.75 [View](#)

5 items found, displaying all items. Page: 1

Card Serial Number
10106353
10106354
10106355
10106356
10106357

5 items found, displaying all items. Page: 1

- Click the **serial number** of the card that you want to unblock products on. The **Card Account Details – for card “xxxxxxx”** will appear.
- Click the **Block/Unblock Products** button at the bottom of the page.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

- Generate Reports

Card Account Details - for card 10106357

Card Account Details

View the details of this card below.

[Back to Card Group](#)

[Card Details](#) [Card Order History](#)

Card Serial Number: 10106357

Card Status: Blocked [Unlock Card](#)

Voucher Revalue Type: None [Save](#)

Current Orders - for card 10106357

Current Confirmed and Pending Orders

Product	Valid for	Amount
Product List		
Product Name	Remaining Value	
E-purse	Value: \$0.00	
PugetPass \$1.75	Valid for: May 2009	

[Block/Unblock Products](#)

- Choose the **product** you want to unblock, click on the **Unblocked** button, and type in a reason for unblocking if you choose.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary
- Card Management**
 - Summary of Card Accounts
 - Create / Maintain Branches
 - Create / Maintain Card Groups
- Agreement
 - Manage Agreement Details

Block/Unblock Product(s) details

Block/Unblock Product(s)

	Blocked	Unblocked
<input checked="" type="checkbox"/> E-purse	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> PugetPass \$1.75	<input type="radio"/>	<input checked="" type="radio"/>

Blocking Reason: Other

Unblocking Reason:

[Update](#) [Back](#)

- Click the **Update** button.
- You will receive a message asking if you are sure you want to block the product. Click the appropriate answer.

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Are you sure you wish to block/unblock the product(s) ?

[Yes](#) [No](#)

The screen will refresh with a green **“Confirmation”** message indicating the selected products have been actionlisted to be unblocked.

948 - SUEB2 [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary
- Card Management**
 - Summary of Card Accounts
 - Create / Maintain Branches

Block/Unblock Product(s) details

Block/Unblock Product(s)

CONFIRMATION

Success:
→ The selected product/s have been actionlisted to be unblocked.

	Blocked	Unblocked
<input checked="" type="checkbox"/> e-Purse (No Unblocking Reason Entered)	<input type="radio"/>	<input checked="" type="radio"/> (Pending)

Use the Back button or click on a button in the left navigation bar to move to a different page.

CHANGE E-VOUCHER SETTINGS

The Lead Agency sets the e-vouchers program for the Business Account.

Most companies find that the **Both** setting provides the most flexibility to the cardholder, but is more difficult to administer. For that reason, the Lead Agency will usually set the e-voucher program to **Remote**, providing easier administration for the Business Account.

Agreement Revalue Type	Order Revalue Type	Card Revalue Type	Cardholder Actions
Remote	Remote	Remote	Cannot change
Automatic	Automatic	Automatic	Cannot change
Both	Automatic	Automatic	Can update to remote

The **Remote** setting means that the cardholder must take an action to spend the voucher. The cardholder must **register** his/her card and can purchase a product either online at the cardholder website – www.orcacard.com – or at a walk-in center. He/she cannot simply tap the card at an ORCA reader to download the value. The cardholder cannot change this setting.

The **Automatic** setting means that the voucher value will automatically download into the cardholder's **e-purse** when he/she taps the card at an ORCA reader. The cardholder can then use that e-purse value to pay for individual trips or to purchase a monthly pass. The cardholder cannot change this setting.

NOTE: When using e-purse to purchase a product, the cardholder must do so in a "**card present**" environment (e.g., at a Customer Service office or a ticket vending machine). The cardholder cannot make a purchase via the website using e-purse value.

The **Both** setting means that the voucher value will automatically download into the cardholder's e-purse when he/she taps the card at an ORCA reader, unless the cardholder chooses to update his/her individual setting to Remote. If the cardholder changes the setting to Remote, the Remote rules will apply.

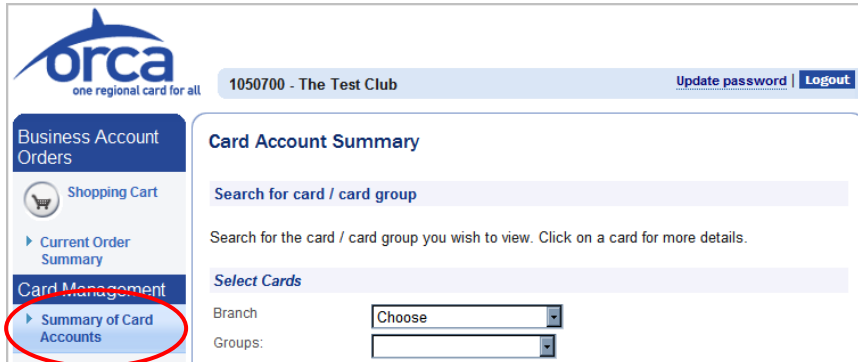
NOTE: The setting defaults to **Automatic** for the first month on each card set up with a **Both** setting to receive an e-voucher. Following that first month, the cardholder can change the setting to **Remote** if he/she chooses to do so.

A Business Account representative may not change its e-voucher program from Automatic revalue to Remote revalue.

However, a Business Account representative may change its e-voucher program from Remote to Automatic for an individual card or for a group of cards, if the Lead Agency established it as a Remote setting. The steps to make this change are described below.

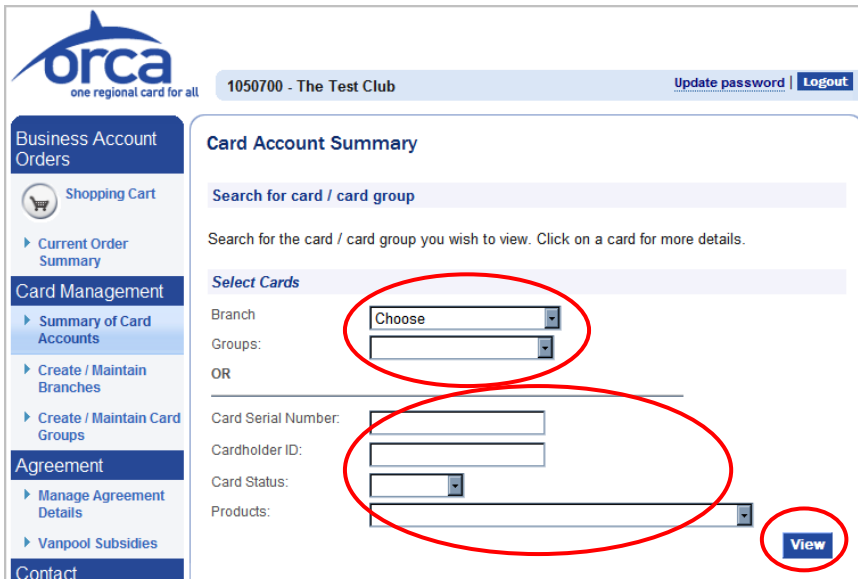
NOTE: Once you change the e-voucher setting to Automatic, you cannot change it back to Remote and the cardholder cannot do so either.

1. Click on the **Summary of Card Accounts** button.



The screenshot shows the ORCA Business Account Summary page. The left sidebar contains a menu with the following items: Business Account Orders, Shopping Cart, Current Order Summary, Card Management, Summary of Card Accounts (circled in red), Create / Maintain Branches, Create / Maintain Card Groups, Agreement, Manage Agreement Details, Vanpool Subsidies, and Contact. The main content area is titled 'Card Account Summary' and includes a search bar for card / card group, a description of the search function, and a 'Select Cards' section with dropdown menus for Branch and Groups.

2. Select the card or group that you want to change to Automatic using any of the search criteria available.
 - a. Use the Branch and Group criteria, or
 - b. Search by a specific card serial number, or
 - c. Search by card status (e.g. Active or Blocked), or
 - d. Search by type of product on the card.



The screenshot shows the ORCA Business Account Summary page with search criteria circled in red. The 'Summary of Card Accounts' link in the left sidebar is circled in red. The main content area is titled 'Card Account Summary' and includes a search bar for card / card group, a description of the search function, and a 'Select Cards' section. The search criteria are circled in red: Branch (Choose), Groups (empty), OR, Card Serial Number (empty), Cardholder ID (empty), Card Status (empty), and Products (empty). A 'View' button is also circled in red.

3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.

Business Account Orders

[Shopping Cart](#)

[Current Order Summary](#)

Card Management

[Summary of Card Accounts](#)

[Create / Maintain Branches](#)

[Create / Maintain Card Groups](#)

Agreement

[Manage Agreement Details](#)

[Vanpool Subsidies](#)

Contact

[Contact Us](#)

Reports

[Generate Reports](#)

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch:

Groups:

OR

Card Serial Number:

Card Status:

Products:

[View](#)

5 items found, displaying all items. Page: 1

Card Serial Number
10106353
10106354
10106355
10106356
10106357

5 items found, displaying all items. Page: 1

4. Click the **serial number** of the card that you want to change to Automatic revalue. The **Card Account Details – for card “xxxxxxx”** will appear.

5. Click **Change to Automatic**.

Business Account Orders

[Shopping Cart](#)

[Current Order Summary](#)

Card Management

[Summary of Card Accounts](#)

[Create / Maintain Branches](#)

[Create / Maintain Card Groups](#)

Agreement

[Manage Agreement Details](#)

Card Account Details - for card 10020036

Card Account Details

View the details of this card below.

[Back to Card Group](#)

[Card Details](#)

[Card Order History](#)

Card Serial Number: 10020036

Card Status: Active

Voucher Revalue Type: Remote

[Block Card](#)

[Change to Automatic](#)

[Save](#)

You will receive the following “Card Account Details” screen, which will indicate the Voucher Revalue type has been successfully changed.

The screenshot shows the ORCA website interface. At the top, the ORCA logo is on the left, and the user is logged in as '1094 - CT TEST_SQM' with links for 'Update password' and 'Logout'. The left sidebar contains navigation menus: 'Business Account Orders' (Shopping Cart, Current Order Summary), 'Card Management' (Summary of Card Accounts, Create / Maintain Branches, Create / Maintain Card Groups), and 'Agreement' (Manage Agreement Details). The main content area is titled 'Card Account Details - for card 10020036'. It includes a 'Card Account Details' section with the instruction 'View the details of this card below.' and a 'Back to Card Group' button. Below this are two tabs: 'Card Details' (selected) and 'Card Order History'. The 'Card Details' tab shows the following information: Card Serial Number: 10020036, Card Status: Active, and Voucher Revalue Type: Automatic (circled in red). There are 'Block Card' and 'Save' buttons at the bottom right of the details section.

NOTE: As indicated prior to these instructions, once you change the e-voucher setting to Automatic, you cannot change it back to Remote and the cardholder cannot do so either.

USE OF E-VOUCHERS BY EMPLOYEES

If the Business Account chose either the **Both** or the **Automatic** setting, the e-voucher value, once purchased by the Business Account, will automatically transfer to the e-purse when the cardholder next taps his/her card, following the 24 to 48 hour waiting period.

NOTE: When using e-purse to purchase a product, the cardholder must do so in a "**card present**" environment (e.g., at a Customer Service office or a ticket vending machine). The cardholder cannot make a purchase via the website using e-purse value.

The following instructions may help your employees successfully change their e-voucher from **Automatic** to **Remote**.

1. Wait until after the first e-voucher has been redeemed (the first e-voucher on any individual card under a **Both** or an **Automatic** setting will always be **Automatic**).
2. Log into ORCA (www.orcacard.com).
3. Register your card if you have not already done so.
4. Click Manage My ORCA.
5. Click Manage Autoload (if the Business Account set the e-voucher as Automatic).
6. Change your Autoload setting to Remote.
7. Wait 24 to 48 hours for the system to recognize the change.

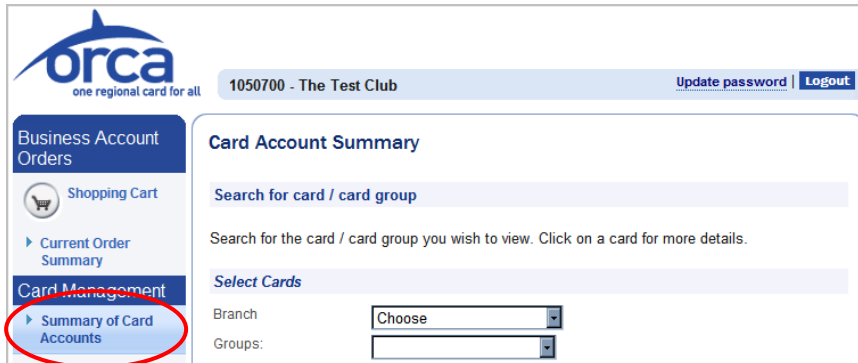
The following instructions may help your employees successfully use a **Remote** e-voucher to purchase a product. The cardholder can redeem a Remote e-voucher at the Cardholder website or in person at a Customer Service Office using these instructions.

1. Log into ORCA (www.orcacard.com).
2. Register your card if you have not already done so.
3. Click Manage My ORCA.
4. Click on "Add Value" in the left-hand menu. Do not use any other "Add Value" link.
5. Select "Purchase a PugetPass" or "Add value to E-purse" and then click "Continue."
6. Select the appropriate value for your desired pass or e-purse.
7. Click "Next "
8. Click "Confirm."
9. Click "Pay now."
10. If you have a valid e-voucher, the next screen will show "Pay by Electronic Voucher."
11. Choose the radial button that lists your Company's name and click Continue.
12. Complete the payment information.
13. Click "Submit payment."
14. Your receipt will appear, click "Print receipt." Keep for your own records.
15. It will take up to 48 hours for your Puget Pass or e-purse purchase to be validated. Make sure you purchase your product at least 2 days prior to date you need to ride transit.

VIEW CARD ACCOUNT HISTORY

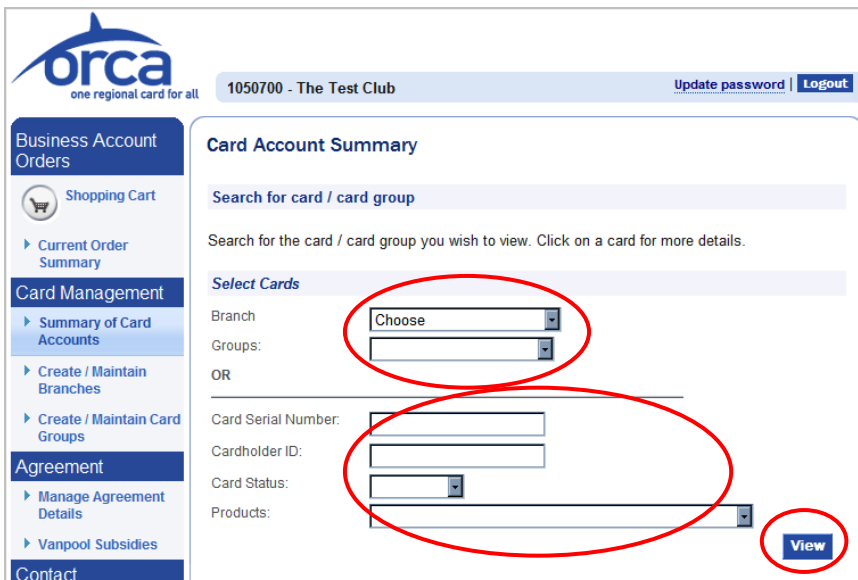
You can view the historical information for any card by completing the following steps.

1. Click on the **Summary of Card Accounts** button.



The screenshot shows the ORCA Business Account Summary page. The left sidebar contains a 'Card Management' section with a red circle around the 'Summary of Card Accounts' link. The main content area is titled 'Card Account Summary' and includes a search bar, a description, and a 'Select Cards' section with dropdown menus for 'Branch' and 'Groups'.

2. Select the card that you want to view using any of the search criteria available.
 - a. Use the Branch and Group criteria, or
 - b. Search by a specific card serial number, or
 - c. Search by card status (e.g. Active or Blocked), or
 - d. Search by type of product on the card.



The screenshot shows the ORCA Business Account Summary page with search criteria. The 'Select Cards' section has dropdown menus for 'Branch' and 'Groups'. Below these are input fields for 'Card Serial Number', 'Cardholder ID', 'Card Status', and 'Products'. A red circle highlights the 'View' button at the bottom right.

3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.

ORCA
one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Contact

- Contact Us

Reports

- Generate Reports

Card Account Summary

Search for card / card group

Search for the card / card group you wish to view. Click on a card for more details.

Select Cards

Branch:

Groups:

OR

Card Serial Number:

Card Status:

Products:

[View](#)

5 items found, displaying all items. Page: 1

Card Serial Number
10106353
10106354
10106355
10106356
10106357

5 items found, displaying all items. Page: 1

- Click the **serial number** of the card that you want to view. The **Card Account Details – for card “xxxxxxx”** will appear.
- Click on the **Card Order History** tab.

ORCA
one regional card for all

1159 - Pierce Transit Test Choice [Update password](#) [Logout](#)

Business Account Orders

- Shopping Cart
- Current Order Summary

Card Management

- Summary of Card Accounts
- Create / Maintain Branches
- Create / Maintain Card Groups

Agreement

- Manage Agreement Details
- Vanpool Subsidies

Card Account Details - for card 10106357

Card Account Details

View the details of this card below.

[Card Details](#) [Card Order History](#) [Back to Card Group](#)

Card Serial Number: 10106357

Card Status: Blocked [Unblock Card](#)

Voucher Revalue Type: None [Save](#)

Current Order for card 10106357

- The transaction history for that card will appear.

Business Account
Orders



Shopping Cart

▶ [Current Order Summary](#)

Card Management

▶ [Summary of Card Accounts](#)

▶ [Create / Maintain Branches](#)

▶ [Create / Maintain Card Groups](#)

Agreement

▶ [Manage Agreement Details](#)

▶ [Manage Subsidies](#)

Card Account Details - for card 10020001

Card Account History

View the history of this card below.

[Back to Card Group](#)

[Card Details](#)

[Card Order History](#)

Date Created	Product	Amount/Value	Redeemed
04/14/2009	Purse	\$13.00	Y
04/14/2009	Remote Voucher (Valid until: 5/14/2009)	\$20.00	N
03/05/2009	Regional Business Passport	\$0.00	Y

GENERATE REPORTS

Business Accounts can generate a variety of reports that may be useful in managing their transportation benefits programs. You can generate the following standard reports:

- Expired Vouchers
- Institutional Card Account Transaction History (only available for WSF Commercial Accounts)
- Institutional Card Status
- Institutional Linked Ridership Summary
- Institutional Transaction History
- Institutional Unlinked Ridership Summary
- Institutional Vanpool Subsidy Status
- Institutional Vanpool Usage
- Unredeemed Products

Viewing reports requires a separate login from the Business Accounts website.

If when logging on to any portion of the Report Portal you receive a certificate error message, please click on the **Yes** button. The certificate is authentic. It may look like the following:



REPORT LOGIN

1. Click on the **Generate Reports** button at the bottom of the left navigation bar.

The screenshot shows the ORCA Business Account portal. The left navigation bar includes links for Business Account Orders, Shopping Cart, Current Order Summary, Card Management, Agreement, Contact, and Reports. The 'Reports' link is highlighted with a red circle, and its sub-link 'Generate Reports' is also highlighted. The main content area displays the 'Order Summary' page, which includes a 'Current Orders Summary' section with a table of orders. The table has columns for Order Number, Order Status, Order Month / Date Created, Order Item, and Order Amount. A single order is listed with Order Number 8069, Status Completed, Date 07/30/2008, Item Cards, and Amount \$ 202.50. Below the table are buttons for 'New Card Order', 'New Product Order', 'Cancel Orders', and 'Unconfirm'.

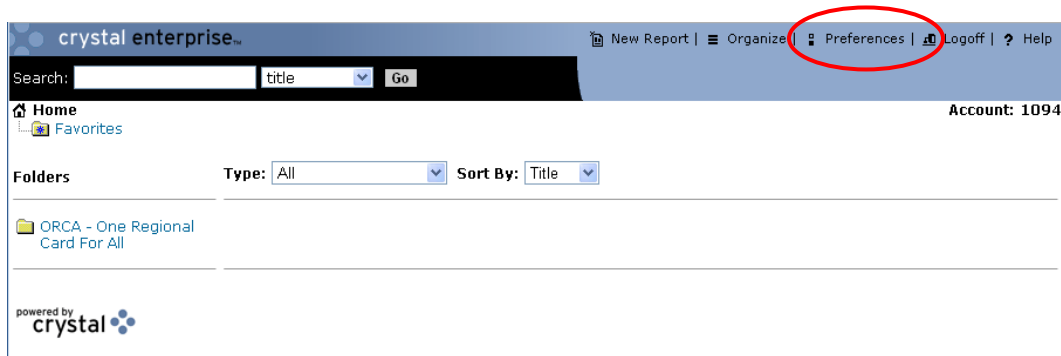
2. Logon to the **Report Portal**.

- a. Enter your **report portal username**. This username is **rfcs-public\xxxx** where "xxxx" is your Business Account ID number (e.g., rfcs-public\1159).
- b. Enter your **password**, using the same password you established for your Business Account.
- c. Ensure that the Authentication reads "**Windows AD**." If that field is blank or has some other information in the box, please use the drop down menu to choose Windows AD.
- d. Click on the **Log On** button.

The screenshot shows the 'Report Portal' login form. The title 'Report Portal' is displayed in a large, stylized font. Below the title is a black bar. The form is titled 'Log On to Report Portal' and includes a section for 'Existing User'. The form fields are: System (asb-sac-cas-003), User Name (rfcs-public\1094), Password (masked with dots), and Authentication (Windows AD). A 'Log On' button is located at the bottom of the form.

SET REPORT PORTAL PREFERENCES

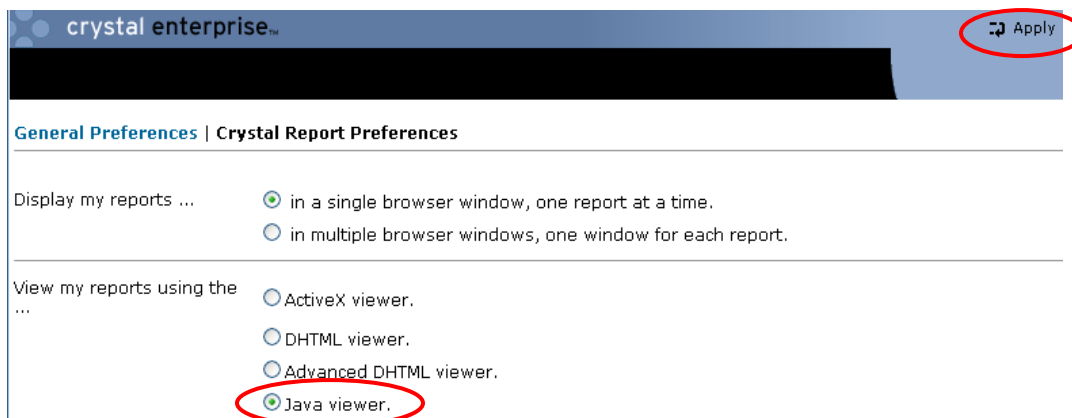
1. Set your **Preferences**. You must complete this step prior to running reports the first time. Once set, you should not have to change the settings.
 - a. Click on **Preferences** in the upper right corner.



- b. Click on **Crystal Reports Preferences** in the upper left portion of the screen.



- c. Select **Java Viewer** under the "View my reports using the..." box. You must choose Java Viewer to view any reports generated in Crystal Reports view.

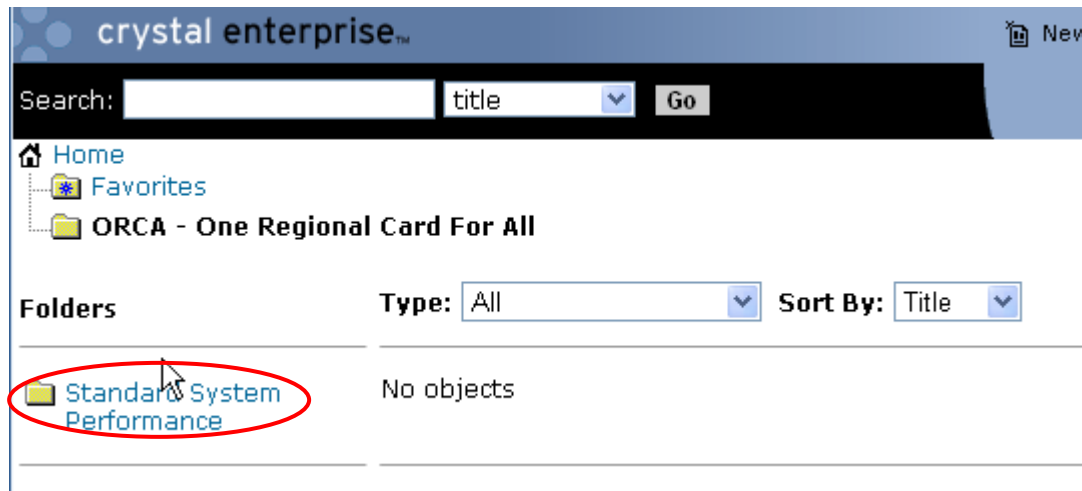


- d. Click the **Apply** button in the upper right hand portion of your screen.

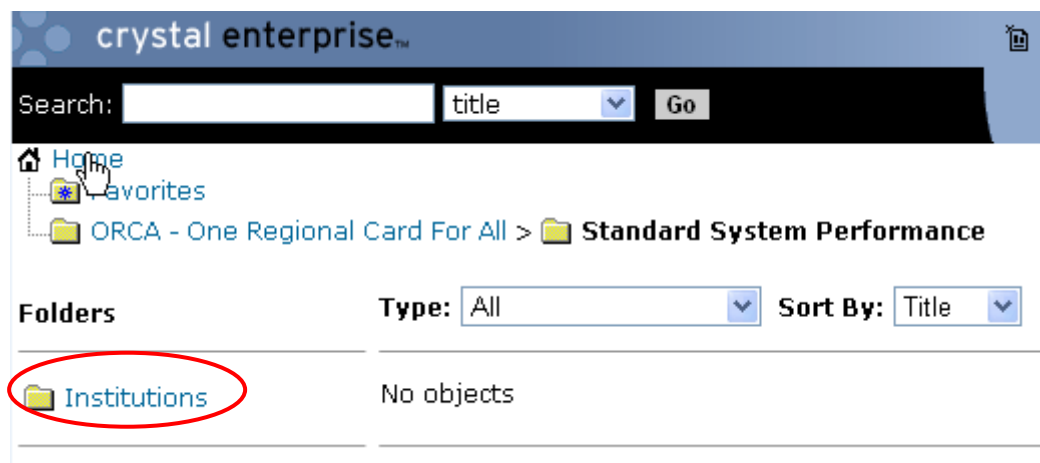
GENERATE REPORTS

Once you successfully login, the ORCA – One Regional Card For All folder appears in bold, black type and you will see a Standard System Performance folder in blue type. To generate reports, please follow these steps.

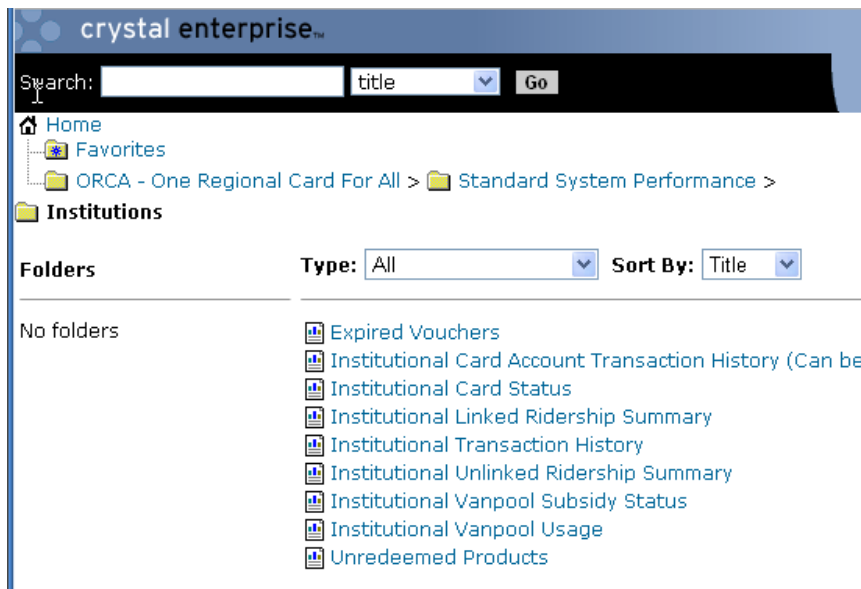
1. Click on the **Standard System Performance** folder.



2. Click on the **Institutions** folder.

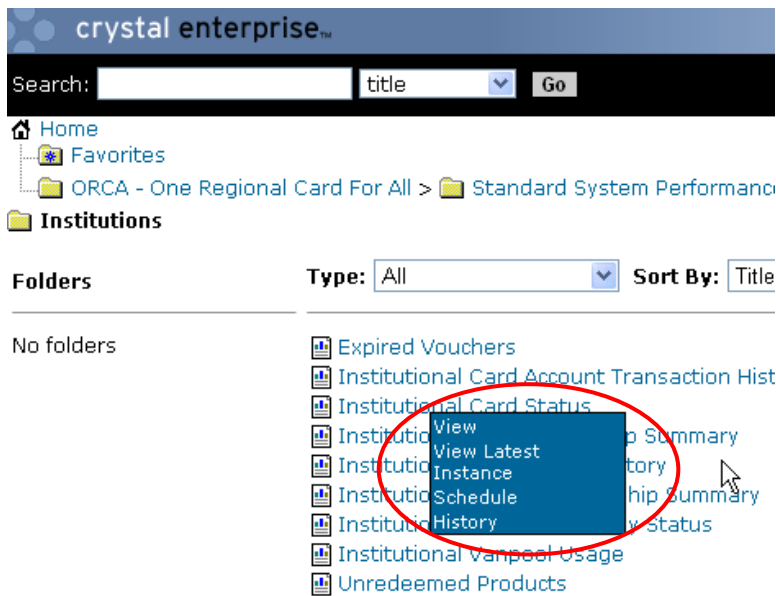


3. This folder provides you with a list of reports that you can generate, view, and print. A short description of each report is provided by hovering your cursor over the report title.



Clicking on any report title will drop down the following options. The default view for every report is Crystal Reports. Through the use of options, you can also run reports in Excel format.

- **View** – Use View to instantly run a report. For some reports, you will be prompted to enter various parameters (e.g., date range). You can view the report on screen, print it, or export it.
- **View Latest Instance** – Use this parameter to view the last report run.
- **Schedule** – Use this parameter to schedule the report to run now or on a periodic basis. You have many options to customize the report using this option, including applying various filters and having the report automatically emailed to various destinations when it is run. Explore the “Customize your options” drop down menu to learn more.
- **History** – Past occurrences of each report will be stored and you can select one to view using the History option.



SETTING PARAMETERS

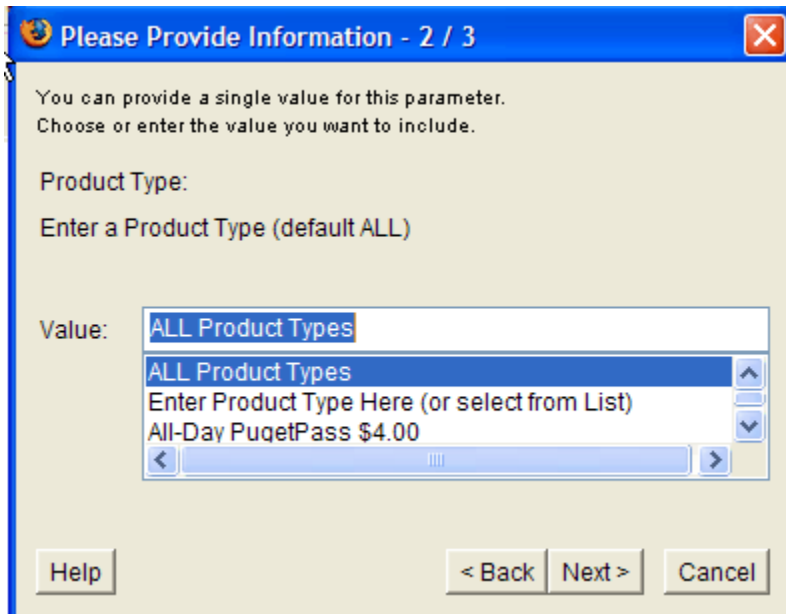
For several reports, you will be required to set parameters prior to generation. Simply read carefully and follow the directions for the type of parameter required.

DATE RANGE

You can usually type in an exact date range or you can choose that the range has no lower or upper limit. Remember that the longer your date range, the longer it will take the report to run. For long date ranges, you should schedule the report to run in the evening and view it the next day.

PRODUCTS

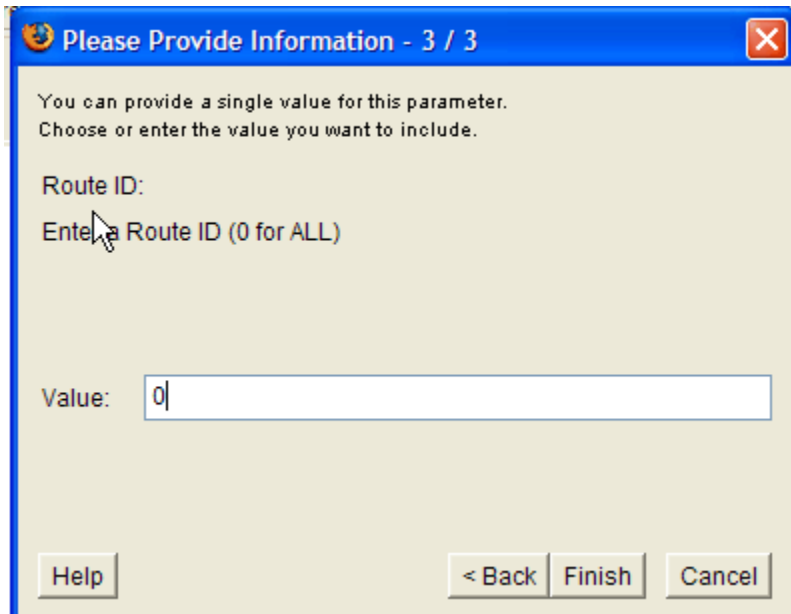
The system may ask you to enter which product you want. If you want all products, accept the default. If you want a specific product, use the drop down menu to choose it.



This screenshot shows a dialog box titled "Please Provide Information - 2 / 3". It contains instructions: "You can provide a single value for this parameter. Choose or enter the value you want to include." The label "Product Type:" is followed by the text "Enter a Product Type (default ALL)". Below this, a "Value:" label is next to a text box containing "ALL Product Types". A dropdown menu is open, showing "ALL Product Types" as the selected item, with other options "Enter Product Type Here (or select from List)" and "All-Day PugetPass \$4.00". At the bottom are buttons for "Help", "< Back", "Next >", and "Cancel".

ROUTES

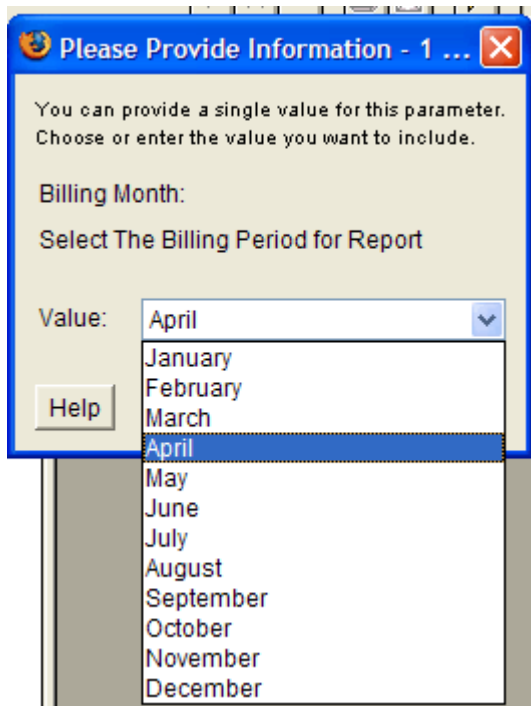
You may want to run a report to gather data on a particular route. If so, enter the route ID. If you want data on all routes, enter 0.



This screenshot shows a dialog box titled "Please Provide Information - 3 / 3". It contains instructions: "You can provide a single value for this parameter. Choose or enter the value you want to include." The label "Route ID:" is followed by the text "Enter a Route ID (0 for ALL)". Below this, a "Value:" label is next to a text box containing the number "0". At the bottom are buttons for "Help", "< Back", "Finish", and "Cancel".

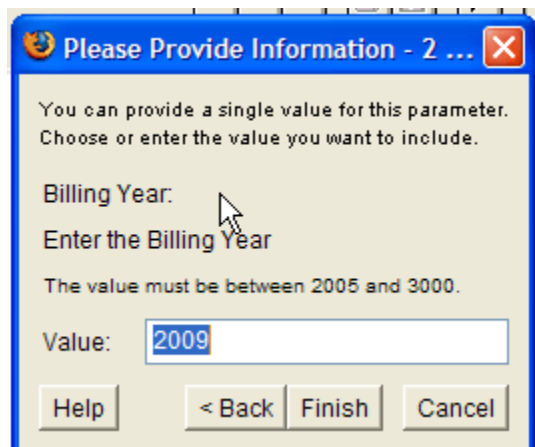
BILLING PERIOD

This report will ask you to provide a billing month. Use the drop down menu to make your choice.



The dialog box is titled "Please Provide Information - 1 ...". It contains the text: "You can provide a single value for this parameter. Choose or enter the value you want to include." Below this, it says "Billing Month:" and "Select The Billing Period for Report". There is a "Value:" label next to a dropdown menu currently showing "April". The dropdown menu is open, displaying a list of months from "January" to "December", with "April" highlighted. A "Help" button is located to the left of the dropdown menu.

It will also ask you for a billing year. Type in the year.



The dialog box is titled "Please Provide Information - 2 ...". It contains the text: "You can provide a single value for this parameter. Choose or enter the value you want to include." Below this, it says "Billing Year:" and "Enter the Billing Year". A note states: "The value must be between 2005 and 3000." There is a "Value:" label next to a text input field containing "2009". At the bottom, there are four buttons: "Help", "< Back", "Finish", and "Cancel". A mouse cursor is pointing at the "Billing Year:" label.

REPORT DESCRIPTIONS

NOTE: Report titles and headers use the term "Institutional" instead of "Business." The reports apply to all Business Accounts, with the exception of the Institutional Card Account Transaction History report. See below for details.

EXPIRED VOUCHERS REPORT

The **Expired Vouchers** report helps the Business Account determine the total value of expired e-vouchers and how they were loaded for a given period.

Expired Vouchers						
Lead Agent: King County Metro						
Institution: University of Washington						
Voucher Period: December 2007						
<u>Institution</u>	<u>Institution ID</u>	<u>Branch</u>	<u>Activity</u>	<u>Product Type</u>	<u>CSN</u>	<u>Voucher Amount</u>
University of Washington	12345	Seattle	Autoload	Purse	99999123	\$ 20.00
University of Washington	12345	Seattle	Autoload	Purse	99999124	\$ 10.00
University of Washington	12345	Seattle	Autoload	Purse	99999125	\$ 35.00
Subtotal Purse					3	\$ 65.00
University of Washington	12345	Seattle	Autoload	Regional Pass	99999126	\$ 10.00
Subtotal Regional Pass					1	\$ 10.00
University of Washington	12345	Seattle	Autoload	Agency Pass	99999127	\$ 5.00
Subtotal Agency Pass					1	\$ 5.00
Subtotal Autoload					5	\$ 80.00
University of Washington	12345	Seattle	Remote Revalue	Purse	99999128	\$ 20.00
University of Washington	12345	Seattle	Remote Revalue	Purse	99999129	\$ 20.00
University of Washington	12345	Seattle	Remote Revalue	Purse	99999130	\$ 20.00
Subtotal Purse					3	\$ 60.00
University of Washington	12345	Seattle	Remote Revalue	Regional Pass	99999131	\$ 15.00
University of Washington	12345	Seattle	Remote Revalue	Regional Pass	99999132	25
Subtotal Regional Pass					2	\$ 40.00
Subtotal Remote Revalue					5	\$ 100.00
Subtotal Seattle					10	\$ 180.00
Total University of Washington					10	\$ 180.00

INSTITUTIONAL CARD ACCOUNT TRANSACTION HISTORY REPORT

The Institutional Card Account Transaction History report is for Washington State Ferry commercial accounts only.

INSTITUTIONAL CARD STATUS REPORT

The Institutional Card Status report shows the status of each card.

Institutional Card Status

Lead Agency: King County Metro

Report Period: 12/1/2004 - 12/31/2004

Total Number of Cards Issued

Institution Name	Institution ID	Branch	Cards
University of Washington	123456	Seattle	10
University of Washington	123456	Tacoma	7
Total University of Washington			17
Boeing	123457	n/a	5
Boeing			5

Institution	Institution ID	Branch	Activity Status	CSN	Registered
University of Washington	123456	Seattle	Loaded but not used	99999123	Yes
University of Washington	123456	Seattle	Loaded but not used	99999124	Yes
Subtotal Loaded but not used				2	
University of Washington	123456	Seattle	No Activity/Not Blocked	99999125	Yes
University of Washington	123456	Seattle	No Activity/Not Blocked	99999126	No
Subtotal No Activity/Not Blocked				2	
University of Washington	123456	Seattle	Blocked	99999127	Yes
Subtotal Blocked				1	
University of Washington	123456	Seattle	Active	99999128	Yes
University of Washington	123456	Seattle	Active	99999129	Yes
University of Washington	123456	Seattle	Active	99999130	Yes
University of Washington	123456	Seattle	Active	99999131	Yes
University of Washington	123456	Seattle	Active	99999132	Yes
Subtotal Active				5	
Subtotal Seattle				10	
University of Washington	123456	Tacoma	Active	99999133	Yes
University of Washington	123456	Tacoma	Active	99999134	Yes
University of Washington	123456	Tacoma	Active	99999135	Yes
University of Washington	123456	Tacoma	Active	99999136	Yes
University of Washington	123456	Tacoma	Active	99999137	Yes
University of Washington	123456	Tacoma	Active	99999138	No
University of Washington	123456	Tacoma	Active	99999139	No
Subtotal Active				7	
Subtotal Tacoma				7	
Total University of Washington				17	

INSTITUTIONAL LINKED RIDERSHIP SUMMARY REPORT

The Institutional Linked Ridership Summary report provides Business Accounts with a summary of ridership statistics for cardholders.

This report allows the Business Account to gauge the usage of each transit service provider. It will provide a summary of the Business Account card linked trips; i.e., transfers made between agencies, and the total retail value of each trip. This report does not reflect the amount paid to each transit service provider, as the transit providers share the retail value based on a pass contribution value established among the agencies. The linked trips are based on fare payment transactions, which reflect Business Account card usage.

Institutional Linked Ridership Summary								
Report Dates: 1/01/2005 to 1/31/2005 Lead Agency: King County Metro Institution: University of Washington Institution ID: 12345 Branch: Seattle								
CT	ET	KCM	KT	PT	ST	Linked Trips	Linked Trip Fare	Full Fare Value
X	X	X	X	X	X	100	\$ 2.00	\$ 200.00
X	X	X	X	X	X	100	\$ 2.50	\$ 250.00
X	X	X	X	X	X	100	\$ 3.00	\$ 300.00
X	X	X	X	X		100	\$ 2.00	\$ 200.00
X	X	X	X	X		100	\$ 2.50	\$ 250.00
X	X	X	X	X		100	\$ 3.00	\$ 300.00
X	X	X	X		X	100	\$ 2.00	\$ 200.00
X	X	X	X		X	100	\$ 2.50	\$ 250.00
X	X	X	X		X	100	\$ 3.00	\$ 300.00
X	X	X	X			100	\$ 2.00	\$ 200.00
X	X	X	X			100	\$ 2.50	\$ 250.00
X	X	X	X			100	\$ 3.00	\$ 300.00
X	X	X		X	X	100	\$ 2.00	\$ 200.00
X	X	X		X	X	100	\$ 2.50	\$ 250.00
X	X	X		X	X	100	\$ 3.00	\$ 300.00
X	X	X		X		100	\$ 2.00	\$ 200.00
X	X	X		X		100	\$ 2.50	\$ 250.00
X	X	X		X		100	\$ 3.00	\$ 300.00
X	X	X			X	100	\$ 2.00	\$ 200.00
X	X	X			X	100	\$ 2.50	\$ 250.00
X	X		X	X		100	\$ 3.00	\$ 300.00
(continues for as many combinations that exist during timeframe)								
...								
...								
(at end)								
↓								
WSF						100	\$ 6.50	\$ 650.00

INSTITUTIONAL TRANSACTION HISTORY REPORT

The Institutional Transaction History report provides the Business Account with information about card use.



Institutional Transaction History

Lead Agency: Community Transit
Institution: CT TEST_SQM
Report Period: to 5/15/2009
Product Type: ALL Product Types

Institution ID	Branch	Product Type	Txn Type	Device	Service Participant	Mode	Route ID	Add Value	Fare Payment	CEFFV	Voucher Payment	Device Location	Txn Date/Time
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Sound Transit	Bus	510	\$0.0000	\$0.00	3	No	CT-BUS-9121	4/22/09 2:50 pm
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Sound Transit	Bus	510	\$0.0000	\$0.00	3	No	CT-BUS-9050	4/22/09 2:42 pm
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Sound Transit	Bus	510	\$0.0000	\$0.00	3	No	CT-BUS-9050	4/22/09 3:21 pm
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Sound Transit	Bus	532	\$0.0000	\$0.00	3	No	CT-BUS-9114	4/22/09 3:42 pm
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Sound Transit	Bus	532	\$0.0000	\$0.00	3	No	CT-BUS-9112	4/22/09 3:11 pm
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Sound Transit	Bus	510	\$0.0000	\$0.00	3	No	CT-BUS-9522	4/22/09 3:09 pm
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Sound Transit	Bus	532	\$0.0000	\$0.00	3	No	CT-BUS-9020	4/22/09 4:16 pm
1094	Default Branch - 1094	Regional Business Passport	Product Pass Use Journey	OBFTP	Everett Transit	Bus	7	\$0.0000	\$0.00	1	No	ET-BUS-305	4/17/09 6:30 am

INSTITUTIONAL UNLINKED RIDERSHIP SUMMARY REPORT

The Institutional Unlinked Ridership Summary report provides the Business Account with summary ridership statistics for cardholders. This report provides the boarding statistics for each Business Account card by transit service provider, route, and transaction date and time. The transactions shown are fare payment transactions, which reflect Business Account card usage.

Service participant is the service used. Source participant is the agency that operates the service; e.g., King County Metro operates the Sound Transit service in the first group.

Institutional Unlinked Ridership Summary								
Report Dates: 1/01/2005 to 1/31/2005								
Lead Agency: King County Metro								
Institution: University of Washington								
<u>Institution ID</u>	<u>Branch</u>	<u>Service Participant</u>	<u>Source Participant</u>	<u>Transit Operator</u>	<u>Mode</u>	<u>Cash Equivalent Full Fare Value</u>	<u>Boardings</u>	<u>Total Fare Value</u>
12345	Seattle	ST	KCM	KCM	BUS	\$1.00	500	\$500.00
12345	Seattle	ST	KCM	KCM	BUS	\$1.50	500	\$750.00
Subtotal ST/KCM							1000	\$1,250.00
12345	Seattle	ST	CT	CT	BUS	\$1.00	500	\$500.00
12345	Seattle	ST	CT	FT	BUS	\$1.50	500	\$750.00
Subtotal ST/CT							1000	\$1,250.00
Subtotal ST							2000	\$2,500.00
12345	Seattle	KCM	KCM	KCM	BUS	\$1.00	500	\$500.00
12345	Seattle	KCM	KCM	KCM	BUS	\$1.50	500	\$750.00
Subtotal KCM/KCM							1000	\$1,250.00
Subtotal KCM							1000	\$1,250.00
12345	Seattle	CT	CT	CT	BUS	\$1.00	500	\$500.00
12345	Seattle	CT	CT	FT	BUS	\$1.75	500	\$875.00
Subtotal CT/CT							1000	\$1,375.00
Subtotal CT							1000	\$1,375.00
12345	Seattle	KT	KT	KT	BUS	\$1.00	500	\$500.00
12345	Seattle	KT	KT	FT	BUS	\$1.75	500	\$875.00
Subtotal KT/KT							1000	\$1,375.00
Subtotal KT							1000	\$1,375.00
12345	Seattle	PT	PT	PT	BUS	\$1.00	500	\$500.00
12345	Seattle	PT	PT	PT	BUS	\$1.75	500	\$875.00
Subtotal PT/PT							1000	\$1,375.00
Subtotal PT							1000	\$1,375.00
12345	Seattle	ET	ET	ET	BUS	\$1.00	500	\$500.00
12345	Seattle	ET	ET	ET	BUS	\$1.75	500	\$875.00
Subtotal ET/ET							1000	\$1,375.00
Subtotal ET							1000	\$1,375.00
12345	Seattle	WSF	WSF	WSF	Ferryboat	\$5.00	500	\$2,500.00
12345	Seattle	WSF	WSF	WSF	Ferryboat	\$8.00	500	\$4,000.00
Subtotal WSF/WSF							1000	\$6,500.00
Subtotal WSF							1000	\$6,500.00
Subtotal Seattle Branch							8000	\$15,750.00
Total University of Washington							8000	\$15,750.00

INSTITUTIONAL VANPOOL SUBSIDY STATUS REPORT (FUTURE CAPABILITY)

The Institutional Vanpool Subsidy Status report, when available, will provide Business Accounts with details of subsidies used on vanpool services. It will provide Business Account vanpool administrators with the full fare amount per vanpool, the Business Account's subsidized cost and the cardholder's share of costs.

Institutional Vanpool Subsidy Status									
Lead Agent:		King County Metro							
Institution:		University of Washington							
Vanpool ID:		All Vanpools							
Report Period:		7/1/04-7/31/04							
<u>Institution</u>	<u>Institution ID</u>	<u>Branch</u>	<u>Agency Vanpool ID</u>	<u>CSN</u>	<u>Product Type</u>	<u>Monthly Vanpool Fare Amount</u>	<u>Institution Subsidy Agreed Amount</u>	<u>Cardholder Contribution</u>	
University of Washington	12345	Seattle	46	99999123	KCM VP \$50 Pass	\$ 40.00	\$ 50.00	\$ -	
University of Washington	12345	Seattle	46	99999124	KCM VP \$30 Pass	\$ 40.00	\$ 30.00	\$ 10.00	
Subtotals Vanpool 46						\$ 80.00	\$ 80.00	\$ 10.00	
University of Washington	12345	Seattle	56	99999125	CT VP \$50 Pass	\$ 60.00	\$ 10.00	\$ 50.00	
University of Washington	12345	Seattle	56	99999126	CT VP \$40 Pass	\$ 60.00	\$ 20.00	\$ 40.00	
University of Washington	12345	Seattle	56	99999127	CT VP \$40 Pass	\$ 60.00	\$ 20.00	\$ 40.00	
Subtotal Vanpool 56						\$ 180.00	\$ 50.00	\$ 130.00	
Subtotal Seattle						\$ 260.00	\$ 130.00	\$ 140.00	
University of Washington	12345	Tacoma	33	99999128	PT VP \$30 Pass	\$ 30.00	\$ 30.00	\$ -	
University of Washington	12345	Tacoma	33	99999129	PT VP \$30 Pass	\$ 30.00	\$ 30.00	\$ -	
Subtotal Vanpool 33						\$ 60.00	\$ 60.00	\$ -	
Subtotal Tacoma						\$ 60.00	\$ 60.00	\$ -	
Subtotal University of Washington						\$ 320.00	\$ 190.00	\$ 140.00	
Total King County Metro						\$ 320.00	\$ 190.00	\$ 140.00	

INSTITUTIONAL VANPOOL USAGE REPORT (FUTURE CAPABILITY)

For each Business Account vanpool, this report will, when available show the cards and the products and value used by each of cards for the reporting period.

Institutional Vanpool Usage								
Lead Agent: King County Metro Institution: University of Washington Vanpool ID: All Vanpools Report Period: 7/1/04-7/9/04								
<u>Institution</u>	<u>Institution ID</u>	<u>Branch</u>	<u>Agency Vanpool ID</u>	<u>Lead Agent</u>	<u>CSN</u>	<u>Product Type</u>	<u>Date/Time</u>	<u>Fare Value</u>
University of Washington	12345	Seattle	46	KCM	99999123	Purse	7/1/2004	\$ 2.00
University of Washington	12345	Seattle	46	KCM	99999123	Purse	7/2/2004	\$ 2.00
University of Washington	12345	Seattle	46	KCM	99999123	Purse	7/3/2004	\$ 2.00
University of Washington	12345	Seattle	46	KCM	99999123	KCM VP \$50 Pass	7/4/2004	\$ 2.00
University of Washington	12345	Seattle	46	KCM	99999123	KCM VP \$50 Pass	7/5/2004	\$ 2.00
University of Washington	12345	Seattle	46	KCM	99999123	KCM VP \$50 Pass	7/8/2004	\$ 2.00
Subtotal 99999123							6	\$ 12.00
University of Washington	12345	Seattle	46	KCM	99999124	KCM VP \$30 Pass	7/4/2004	\$ 2.00
University of Washington	12345	Seattle	46	KCM	99999124	KCM VP \$30 Pass	7/5/2004	\$ 2.00
Subtotal 99999124							2	\$ 4.00
Subtotal Vanpool 46							8	\$ 16.00
University of Washington	12345	Seattle	56	KCM	99999125	CT VP \$50 Pass	7/1/2004	\$ 2.00
University of Washington	12345	Seattle	56	KCM	99999125	CT VP \$50 Pass	7/2/2004	\$ 2.00
Subtotal 99999125							2	\$ 4.00
University of Washington	12345	Seattle	56	KCM	99999123	CT VP \$40 Pass	7/1/2004	\$ 2.00
University of Washington	12345	Seattle	56	KCM	99999123	CT VP \$40 Pass	7/2/2004	\$ 2.00
Subtotal 99999123							2	\$ 4.00
Subtotal Vanpool 56							4	\$ 8.00
Subtotal Seattle							12	\$ 24.00
University of Washington	12345	Tacoma	33	KCM	99999131	PT VP \$30 Pass	7/1/2004	\$ 1.00
University of Washington	12345	Tacoma	33	KCM	99999131	PT VP \$30 Pass	7/2/2004	\$ 1.00
University of Washington	12345	Tacoma	33	KCM	99999131	PT VP \$30 Pass	7/3/2004	\$ 1.00
University of Washington	12345	Tacoma	33	KCM	99999131	PT VP \$30 Pass	7/4/2004	\$ 1.00
University of Washington	12345	Tacoma	33	KCM	99999131	PT VP \$30 Pass	7/5/2004	\$ 1.00
Subtotal 99999131							5	\$ 5.00
Subtotal Vanpool 33							5	\$ 5.00
Subtotal Tacoma							5	\$ 5.00
Subtotal University of Washington							17	\$ 29.00
Total King County Metro							17	\$ 29.00

UNREDEEMED PRODUCTS REPORT

The Unredeemed Products report provides the Business Account with details of products that were ordered, but not redeemed, during the billing period or the agreement period. These products include vouchers which are not redeemed because cardholders did not tag their cards within the required timeframes.

This report can be used to view Business Account cards which are due to expire or have expired, based on the reporting period selected.

Unredeemed Products							
Lead Agency: King County Metro							
Report Period: 12/1/2004 to 12/31/2004							
<u>Institution</u>	<u>Institution ID</u>	<u>Branch</u>	<u>Date</u> <u>Expired</u>	<u>Product Type</u>	<u>CSN</u>	<u>Product</u> <u>Value</u>	<u>Count</u>
University of Washington	12345	Seattle	12/12/2004	ePurse	9991125- 9991224	\$ 35.00	100
University of Washington	12345	Seattle	12/12/2004	ePurse	99999124	\$ 60.00	1
Subtotal 12/12/2004						\$ 95.00	
University of Washington	12345	Seattle	12/18/2004	KCM \$3 Pass	99999125	\$ 15.00	1
University of Washington	12345	Seattle	12/18/2004	KCM \$3 Pass	99999126	\$ 15.00	1
University of Washington	12345	Seattle	12/18/2004	ePurse	99999127	\$ 34.00	1
University of Washington	12345	Seattle	12/18/2004	ePurse	99999128	\$ 20.00	1
Subtotal 12/18/2004						\$ 84.00	
University of Washington	12345	Seattle	12/28/2004	KCM \$3 Pass	99999129	\$ 8.00	1
Subtotal 12/28/2004						\$ 8.00	
Subtotal Seattle						\$ 187.00	
University of Washington	12345	Tacoma	12/13/2008	ePurse	99999123	\$ 35.00	1
Subtotal 12/13/2004						\$ 35.00	
University of Washington	12345	Tacoma	12/17/2008	KCM \$3 Pass	99999125	\$ 15.00	1
University of Washington	12345	Tacoma	12/17/2008	ePurse	99999128	\$ 20.00	1
Subtotal 12/17/2004						\$ 35.00	
Subtotal Tacoma						\$ 70.00	
Total University of Washington						\$ 257.00	
Grand Total King County Metro						\$ 257.00	

APPENDIX A

The following information details the necessary file structure to Import a Card Group. Please seek the expertise of your Information Technology Department should you need assistance.

XML FILE AND RECORD STRUCTURE – CREATE/MAINTAIN CARD GROUPS

File Element	Description/layout
<?xml version="1.0" encoding="UTF8" ?>	Standard XML file header
<maintaincardgroups>	Start file description node
<institution>	Start institution node
<name> Nix BA 001 </name>	Institution name node
<id> 1050479 </id>	Institution id node
</institution>	End institution node
<cardgroups>	Start card groups node
<cardgroup>	Start card group node
<id> 382 </id>	Card group id node
<name> 1234567890123456789012345678901234567890 </name>	Card group name node
</cardgroup>	End card group node
<cardgroup>	Start card group node
<id> 1050405 </id>	Card group id node
<name> Default Group 1050479 </name>	Card group name node
</cardgroup>	End card group node
<cardgroup>	Start card group node
<id> 451 </id>	Card group id node
<name> Group for New Branch </name>	Card group name node
</cardgroup>	End card group node
<cardgroup>	Start card group node
<id> 405 </id>	Card group id node
<name> test </name>	Card group name node
</cardgroup>	End card group node
<cardgroup>	Start card group node
<id> 452 </id>	Card group id node
<name> test 2 </name>	Card group name node
</cardgroup>	End card group node
</cardgroups>	End card groups node
<cards>	Start cards node
<card>	Start card node
<cardserialnumber> 99918010 </cardserialnumber>	Card serial number node
<groupid> 405 </groupid>	Card group id node
</card>	End card node
<card>	Start card node
<cardserialnumber> 99918011 </cardserialnumber>	Card serial number node
<groupid> 405 </groupid>	Card group id node
</card>	End card node
<card>	Start card node
<cardserialnumber> 99916969 </cardserialnumber>	Card serial number node
<groupid> 405 </groupid>	Card group id node
</card>	End card node
<card>	Start card node
<cardserialnumber> 99918000 </cardserialnumber>	Card serial number node
<groupid> 1050405 </groupid>	Card group id node
</card>	End card node
</cards>	End cards node
</maintaincardgroups>	End file description node